MSC Administrator Portal User Workflow

The Administrator Portal is the operational control center of the MSC-MVP Wound Care Platform, enabling MSC staff to process orders, manage customers and sales representatives, configure system rules, and oversee the platform's intelligent engines. Below is a detailed walkthrough of the primary MSC Administrator user journeys.

Initial Login & Dashboard Experience

1. **Authentication & Dashboard Entry**

   - Admin logs in via Supabase authentication with admin credentials
   - System verifies admin role permissions and access level
   - Dashboard loads, displaying:
     - Pending approval queues with count indicators (Orders, Sub-Rep Applications, Provider Verifications)
     - Recent platform activity feed (New orders, User registrations, Status changes)
     - Operational metrics dashboard (Order volume, Approval rates, Processing times)
     - System health indicators (API status, Integration status)
     - Quick action buttons for common tasks

2. **Dashboard Interaction Points**

   - Color-coded priority indicators highlight urgent items requiring attention
   - Clicking any queue count navigates to the filtered list view
   - Metrics cards can be expanded for detailed breakdowns
   - MSC Assist is available for administrative guidance and complex query handling

Order Processing Workflow

1. **Order Queue Management**

   - Admin navigates to "Order Management" from main navigation
   - Comprehensive order table displays with:
     - Advanced filtering options (by status, date range, customer, provider, MAC jurisdiction)
     - Search functionality for Order ID, Customer Name, or Provider
     - Bulk action capabilities for similar orders
     - Color-coded status indicators with clear visual differentiation
   - Default view shows "Pending Admin Approval" orders at top

2. **Order Review Process**

- Admin clicks on an order to open detailed view, displaying:
    - Order metadata (ID, timestamps, requesting provider, facility)
    - Requested products with pricing information
    - MAC Validation Engine results (detailed compliance check results)
    - Eligibility Engine results (payer verification, benefit details)
    - Pre-Authorization status (if applicable)
    - Clinical documentation summary (non-PHI, with option to securely view full documentation if required)
    - Complete order history and audit trail

3. **MAC & Eligibility Verification Review**

    - Admin reviews MAC Validation results:
        - Examines any warning flags or compliance issues
        - Verifies documentation completeness for product/diagnosis
        - Reviews jurisdiction-specific coverage requirements
    - Admin reviews Eligibility verification:
        - Confirms payer coverage for requested products
        - Notes any benefit limitations or exclusions
        - Verifies pre-authorization status if required

4. **Order Decision Actions**

    - Based on validation review, admin selects one of the following actions:
        - **"Approve Order"** (for compliant, eligible orders):
            - Updates order status to "Approved"
            - Triggers Commission Engine calculations
            - Enables next steps for document generation and fulfillment
        - **"Request Additional Information"** (for orders with addressable issues):
            - Selects specific information needed from predefined categories
            - Adds detailed notes explaining requirements
            - Sets order status to "Additional Information Requested"
            - System automatically notifies provider
        - **"Reject Order"** (for non-compliant or ineligible orders):
            - Selects rejection reason from configured list
            - Adds detailed explanation and any alternative suggestions
            - Updates order status to "Rejected"
            - System notifies provider and associated sales rep

5. **Document Generation Process** (for Approved Orders)

    - Admin initiates document generation:
        - Selects appropriate DocuSeal templates based on:
            - Product manufacturer requirements
            - Order type (new patient vs. reorder)
            - Payer requirements

        - System displays template selection screen with recommended templates
    - MSC Assist and DocuSeal Integration Service automatically:
        - Pre-fills templates with order data, product information, and clinical documentation
        - Maps fields appropriately based on template requirements
        - Highlights any fields requiring manual review
    - Admin reviews pre-filled documents:
        - Embedded DocuSeal interface shows document preview
        - Admin can make final adjustments to any fields
        - MSC Assist offers guidance for complex fields
    - Document finalization options:
        - **"Generate Final PDF"** - Creates completed document for download
        - **"Send for E-Signature"** (if required) - Routes to provider for signing
        - **"Save to Order Record"** - Attaches document to order history

6. **Order Fulfillment & Tracking**

    - After document generation, admin processes fulfillment:
        - Updates order status to "Processing" then "Shipped"
        - Enters shipping carrier and tracking information
        - Sets expected delivery date
        - Notes any special handling instructions
    - System automatically:
        - Notifies provider and sales rep of shipment
        - Updates order record with fulfillment details
        - Makes tracking information available in Provider Portal

Customer Management Workflow

1. **Organization & Facility Management**

    - Admin navigates to "Customer Management" section
    - Views hierarchical list of Organizations and their Facilities
    - Can perform actions:
        - Create new Organization/Facility
        - Edit existing Organization/Facility details
        - Assign Sales Representatives to Organizations
        - Manage Organization status (Active/Inactive)

2. **Provider Verification Process**

    - Admin reviews "Pending Provider Verification" queue:
        - Each entry shows provider details (Name, NPI, Credentials, Facility)
        - Admin can view submitted registration information and documentation
    - Verification actions:
        - Verify NPI against external database (manual or automated)

        - Check credentials and specialties
        - Review associated facility information
    - After verification:
        - **"Approve Provider"** - Activates account, grants appropriate permissions
        - **"Request Additional Information"** - Specifies requirements for approval
        - **"Reject Registration"** - Provides reason for rejection

3. **Facility-Provider Assignment Management**

    - Admin can manage which providers are associated with which facilities:
        - View providers assigned to a selected facility
        - Add/remove provider assignments
        - Set provider permissions within facilities (can order, primary location, etc.)
        - Manage assignment status (Active/Inactive)

Sales Representative Management Workflow

1. **Rep & Sub-Rep Profile Management**

    - Admin navigates to "Sales Rep Management" section
    - Views list of all MSC Sales Representatives with:
        - Hierarchical display showing Parent-Sub Rep relationships
        - Status indicators (Active, Pending, Terminated)
        - Performance metrics summary (Orders, Revenue)
    - Admin can:
        - Create new Sales Rep records
        - Edit existing Rep information
        - Set base commission rates
        - Assign geographic territories or specific organizations

2. **Sub-Rep Application Review Process**

    - Admin reviews "Pending Sub-Rep Applications" queue:
        - Each entry shows Parent Rep, prospective Sub-Rep, and proposed commission split
        - Admin can view complete application details and Parent Rep notes
    - Review considerations:
        - Verify Sub-Rep credentials if applicable
        - Review proposed commission structure for compliance with policies
        - Check territory/organization assignments for conflicts
    - Approval actions:
        - **"Approve Sub-Rep Relationship"** - Finalizes commission structure, activates Sub-Rep
        - **"Request Modification"** - Suggests changes to commission structure or terms
        - **"Reject Application"** - Provides reason for rejection

3. **Commission Structure Management**
   - Admin configures commission rules through dedicated interface:
     - Create product-specific commission rates
     - Set manufacturer-specific or category-based rates
     - Define validity periods for commission structures
     - Configure hierarchical commission splits for Parent/Sub-Rep relationships
   - System validates rule integrity and highlights potential conflicts

Engine & Rules Management Workflows

1. **Clinical Opportunity Engine (COE) Management**
   - Admin navigates to "Clinical Opportunity Engine" configuration section
   - Works with curated rules interface:
     - Create new opportunity rules with intuitive form builder
     - Define triggering conditions (ICD-10 codes, wound characteristics, etc.)
     - Specify suggested opportunities (CPT/HCPCS codes, descriptions)
     - Set rule priority and activation status
   - Reviews potential opportunities log:
     - System-identified patterns from actual usage
     - Frequency metrics and context information
     - Option to convert potential opportunities to curated rules
2. **Product Recommendation Engine Management**
   - Similar interface for managing product recommendation rules:
     - Create/edit rules for suggesting specific MSC products
     - Define clinical conditions that trigger recommendations
     - Set product ranking and reasoning templates
     - Manage active/inactive rule status
3. **MAC Validation Rule Configuration**
   - Admin manages MAC validation rules through specialized interface:
     - Configure rules by MAC jurisdiction
     - Define documentation requirements for product/diagnosis combinations
     - Set warning levels and validation messages
     - Update rules based on policy changes
4. **Product Catalog Management**
   - Admin maintains MSC product catalog:
     - Add/edit product details (Name, Q-Code, Description, Features)
     - Manage pricing information (National ASP, size-specific pricing)
     - Upload product images and documentation

        - Set product status (Active, Discontinued, Coming Soon)

System Configuration & Reporting

1. **System Settings Management**

    - Admin configures global platform settings:
        - Manage notification templates and triggers
        - Configure integration settings for external services
        - Define system-wide defaults and behaviors
        - Manage rejection reason lists and other reference data

2. **Report Generation & Analytics**

    - Admin accesses comprehensive reporting dashboard:
        - Generate predefined reports (Sales, Order Status, Approval Rates)
        - Create custom reports with flexible parameters
        - View trend analysis and performance metrics
        - Export data in various formats (CSV, PDF, Excel)

3. **Audit Log Review**

    - Admin can access detailed audit logs:
        - View user activity logs with timestamps
        - Filter by user, action type, or affected resource
        - Review security-relevant events
        - Generate compliance reports for HIPAA documentation

Key UI Components for Admin Portal

The Admin Portal employs specialized UI components designed for operational efficiency:

1. **Advanced Data Tables**

    - Sortable/filterable columns with memory of preferences
    - Bulk action capabilities
    - Expandable rows for additional context
    - Inline editing for quick updates
    - Pagination with configurable page size

2. **Multi-Panel Interfaces**

    - Split-screen views for reviewing related information
    - Master/detail patterns for efficient workflow
    - Docked panels for reference information
    - Context-sensitive help integration

3. **Process Visualization**
    - Status timeline visualization for orders
    - Workflow diagrams for complex processes
    - Decision tree visualization for rule engines
    - Performance dashboards with meaningful metrics
4. **Contextual MSC Assist Integration**
    - Advanced query capabilities for administrators
    - Guidance for complex rule creation
    - Document mapping suggestions
    - Process optimization recommendations
5. **Configuration Builders**
    - Visual rule builders with condition mapping
    - Form designers for template configuration
    - Decision tree editors for complex logic
    - Test/preview capabilities for validation

This comprehensive workflow demonstrates how the MSC Administrator Portal provides powerful tools for managing the platform's operations while leveraging advanced intelligent engines and AI assistance to optimize the wound care supply chain management process.

Provider Portal User Workflow: Product Request & Management

The Provider Portal in the MSC-MVP Wound Care Platform offers a streamlined workflow for healthcare providers to request wound care products, check eligibility, and track request status. Below is a detailed walkthrough of the primary user journey.

Initial Login & Dashboard Experience

1. **Authentication & Dashboard Entry**
    - Provider logs in via Supabase authentication (email/password or SSO if configured)
    - System identifies user role as "Provider" and their associated Facility/Organization
    - Dashboard loads, displaying:

        - Recent requests card (last 5-10 requests with status indicators)
        - Action required notifications (e.g., "Additional information needed for Request #123")
        - Quick action buttons ("Initiate New Request", "Check Eligibility")
        - Clinical opportunities widget showing relevant suggestions

2. **Dashboard Interaction Points**

    - Provider can click any recent request to view details
    - Notifications are actionable (clicking opens the relevant screen)
    - MSC Assist is accessible via a persistent help icon for contextual guidance

New Product Request Workflow

1. **Request Initiation**

    - Provider clicks "Initiate New Product/Service Request" button
    - Multi-step form begins, with progress indicator showing steps:
        - Patient Information → Clinical Assessment → Product Selection → Validation → Review & Submit

2. **Patient Information Entry (Step 1)**

    - Provider enters/selects:
        - Patient identifiers (temporarily handled for API calls)
        - Payer information (insurance plan, member ID)
        - Expected service date
    - MSC Assist offers contextual help: "Need help finding the correct payer ID? Click here for guidance"
    - After completion, provider clicks "Next" to proceed

3. **Clinical Assessment Documentation (Step 2)**

    - System dynamically loads the appropriate wound-specific questionnaire based on wound type selection:
        - For DFU: DFU-specific form appears with fields for Wagner grade, wound duration, etc.
        - For VLU: VLU-specific form loads with fields for CEAP classification, etc.
    - Provider completes structured sections:
        - Wound Details (location, size, depth, tissue type)
        - Conservative Care (prior treatments, duration, response)
        - Vascular Evaluation (if applicable)
        - Lab Results (when relevant)
    - MSC Assist offers real-time guidance:
        - "Based on your selection of 'Wagner Grade 3', documentation of osteomyelitis testing is required"
        - "For Medicare patients with VLUs, compression therapy documentation is essential"
    - Photos or diagrams can be uploaded (stored securely via Azure Health Data Services)
    - Provider completes assessment and clicks "Next"

4. **Product Selection (Step 3)**

    - System presents MSC products with intelligent recommendations based on clinical data entered:

        - "Recommended Products" section shows items prioritized by the Product Recommendation Engine
        - Each product card displays:
            - Product name, image, Q-Code
            - Key features relevant to the documented wound type
            - Available sizes with pricing information
    - Provider can:
        - View detailed product information by clicking a product card
        - Select recommended products or browse full catalog
        - Choose specific size/quantity needed
        - Add multiple products if needed
    - MSC Assist offers guidance: "Based on the documented wound size of 4.2cm², the 2x3cm size would provide appropriate coverage"
    - After selection, provider clicks "Next"

5. **Validation & Eligibility (Step 4)**

    - System automatically runs the MAC Validation Engine:
        - Progress indicator shows "Checking Medicare guidelines..."
        - Results display with color-coded indicators (green for passed checks, yellow for warnings, red for potential issues)
        - Detailed explanations provided for any flags
        - Specific documentation suggestions appear for any potential issues
    - Provider can address warnings by:
        - Adding missing documentation
        - Updating clinical information
        - Acknowledging warnings with clinical justification
    - Once MAC validation is addressed, system runs Eligibility check:
        - Shows "Checking eligibility with [Payer]..."
        - Displays eligibility status (Eligible/Not Eligible/Needs Review)
        - Shows benefit details (co-pay, deductible, out-of-pocket)
        - Indicates if prior authorization is required
    - If prior authorization is needed:
        - System explains PA requirements
        - Offers option to "Submit for Prior Authorization"
        - Tracks PA status within the request
    - Provider addresses any eligibility concerns and clicks "Next"

6. **Clinical Opportunities Review (Optional Step)**

    - System presents suggested additional services identified by the Clinical Opportunity Engine:
        - Each opportunity shows service type, rationale, potential revenue
        - Example: "Consider Offloading DME (L4631) - Required for optimal DFU healing, Medicare covered with documented need"
    - Provider can:

        - Accept opportunities (adding them to the request)
        - Dismiss with reason
        - View clinical evidence supporting the suggestion
    - After reviewing, provider proceeds to final review

7. **Review & Submit (Final Step)**

    - Comprehensive summary screen displays:
        - Patient information (de-identified)
        - Clinical documentation summary
        - MAC validation results
        - Eligibility summary
        - Selected products and quantities
        - Any additional services (from Clinical Opportunities)
        - Estimated patient cost and coverage details
    - Provider reviews all information, makes any final adjustments
    - Clicks "Submit Request to MSC" button
    - Confirmation screen appears with:
        - Request ID for tracking
        - Next steps explanation
        - Expected timeline

Request Tracking & Management

1. **Request List View**

    - Provider clicks "My Requests" in the navigation menu
    - Table/list displays all requests with:
        - Request ID, Patient Reference, Products, Request Date, Status
        - Status indicators with clear visual differentiation (color-coded)
        - Filter controls for status, date range, product type
        - Search box for finding specific requests

2. **Request Detail View**

    - Clicking any request opens its detailed view showing:
        - Complete request information and documentation
        - Status timeline with timestamps for each stage:
            - Submitted → MAC Validated → Eligibility Checked → PA Status (if needed) → MSC Admin Review → Approved/Shipped/etc.
        - Communication history with MSC Admin
        - Documents section showing generated forms (DocuSeal PDFs)

3. **Request Actions**

    - For requests with "Additional Information Needed" status:

        - Clear explanation of what information is needed
        - Form to provide the requested information
        - Option to upload additional documentation
    - For approved requests:
        - Shipping/tracking information when available
        - Ability to download any associated documentation
    - For denied requests:
        - Detailed explanation of denial reason
        - Guidance on potential next steps or alternatives

Additional Supportive Workflows

1. **Standalone Eligibility Check**

    - Provider can perform eligibility checks without creating full product requests
    - Simplified form collects essential patient and payer information
    - Results display benefit summary and coverage details
    - Option to proceed to product request if desired

2. **Care Reminders Management**

    - Patient-centric view of care reminders from Availity
    - Ability to mark reminders as "Addressed" or "Dismissed"
    - Integration with ordering workflow (suggested actions based on reminders)

3. **Product Knowledge Access**

    - Catalog browsing with advanced filtering
    - Detailed product information pages with clinical documentation
    - Training materials and application techniques
    - MSC Assist provides additional product knowledge and comparison guidance

Key UI Components

Throughout these workflows, the Provider Portal utilizes consistent UI patterns:

1. **Step-Through Forms**

    - Clear progress indicators
    - Field validation with immediate feedback
    - Smart defaults based on previous data when possible
    - Save draft functionality for complex requests

2. **Status Visualization**

    - Color-coded status indicators

- Timeline visualization for request progression
- Badge indicators for actions needed

3. **Contextual Help Integration**

    - MSC Assist chat accessible throughout
    - Field-level help tooltips
    - Intelligent form field suggestions
    - Documentation guidance based on payer and wound type

4. **Mobile Responsivity**

    - All workflows function on tablets and mobile devices
    - Simplified views for smaller screens
    - Essential actions remain prominently accessible

This workflow demonstrates how the Provider Portal creates a comprehensive yet intuitive experience that guides healthcare providers through complex wound care ordering processes while leveraging the platform's intelligent engines for validation, recommendation, and opportunity identification.

MSC Sales Representative Portal User Workflow

The Sales Representative Portal empowers MSC sales staff to manage customer relationships, track commissions, build their sales teams (for Parent Reps), and access comprehensive product knowledge. This detailed workflow outlines how both regular MSC Sales Representatives and Sub-Representatives interact with the platform to optimize their sales activities.

Initial Login & Dashboard Experience

1. **Authentication & Personalized Dashboard**

    - Rep logs in via Supabase authentication
    - System identifies user as "MSC Sales Rep" and determines Parent/Sub-Rep status
    - Dashboard displays role-specific information:
        - Commission summary with pending and paid amounts
        - Sales performance metrics (current period vs. previous)
        - Recent customer activity (new orders, status changes)
        - Alerts requiring attention (Sub-Rep applications, order issues)
        - Quick action buttons tailored to role

2. **Dashboard Components & Insights**

- **Commission Widget:**

    - Visual representation of commission trends
    - Current period earnings with comparison to targets
    - Pending vs. paid commission balance
    - For Parent Reps: Additional section showing Sub-Rep generated commissions

- **Sales Performance Metrics:**

    - Orders by volume and value
    - Product category breakdown
    - Conversion rate metrics
    - Territory performance visualization

- **Activity Feed:**

    - Chronological list of customer and order activities
    - Status changes highlighted with action indicators
    - Filter controls for activity types and timeframes

- **Quick Action Buttons:**

    - "View My Commissions" (all Reps)
    - "Invite Sub-Rep" (Parent Reps only)
    - "View Customer List"
    - "Access Product Training"

Commission Tracking & Management

1. **Commission Dashboard Navigation**

    - Rep clicks "View My Commissions" or navigates to Commission section
    - System loads comprehensive commission interface with tabs:
        - Summary View (default)
        - Detailed Transaction List
        - Historical Payout Records
        - Sub-Rep Performance (Parent Reps only)

2. **Direct Commission Management**

    - **Summary View:**

        - Period selector (Month, Quarter, YTD, Custom)
        - Total commissions generated in selected period
        - Status breakdown (Pending, Approved for Payout, Paid)
        - Product category distribution chart
        - Top-performing products by commission value

- **Detailed Transaction List:**
    - Filterable table of individual commission entries showing:
        - Order ID (linked to order details)
        - Date of order
        - Customer/Facility name
        - Products sold
        - Order value
        - Commission rate applied
        - Commission amount
        - Status (Pending, Approved, Paid)
    - Sorting options by any column
    - Export functionality for accounting purposes

3. **Payout History Tracking**

    - **Historical Records View:**
        - List of all completed commission payouts
        - Each record shows:
            - Payout ID
            - Period covered
            - Date processed
            - Total amount
            - Payment method/reference
        - Ability to drill down into individual payouts to see constituent orders
        - Receipt/statement download options

4. **Sub-Rep Commission Oversight** (Parent Reps Only)

    - **Sub-Rep Performance Tab:**
        - Selector to choose specific Sub-Rep or view all
        - Performance comparison across Sub-Reps
        - Commission split visualization showing:
            - Total commission generated by Sub-Rep
            - Sub-Rep's portion based on agreement
            - Parent Rep's portion
        - Detailed transaction list filtered by selected Sub-Rep
        - Commission trend analysis for individual Sub-Reps

Sub-Rep Management (Parent Reps Only)

1. **Sub-Rep Team Overview**

    - Parent Rep navigates to "My Team" or "Sub-Rep Management" section
    - System displays:

        - List of current Sub-Reps with status indicators
        - Performance summary for each Sub-Rep
        - Commission agreement details
        - Action buttons for team management

2. **Sub-Rep Invitation Process**

    - Parent Rep clicks "Invite New Sub-Rep" button
    - System presents invitation form requesting:
        - Prospective Sub-Rep's name and contact information
        - Proposed commission split structure
        - Territory or account assignments (if applicable)
        - Optional notes about relationship terms
    - Parent Rep completes form and submits
    - System processes invitation:
        - Sends email to prospective Sub-Rep with registration link
        - Creates pending application record
        - Notifies MSC Admin of pending approval requirement
    - Parent Rep sees status update: "Invitation Sent - Pending Admin Approval"

3. **Sub-Rep Relationship Management**

    - **Monitoring Application Status:**

        - Visual indicators show each step in approval process
        - Status updates when Admin reviews application
        - Notifications when Sub-Rep completes registration

    - **Active Sub-Rep Management:**

        - View detailed Sub-Rep profiles and performance metrics
        - Track order and commission activity by Sub-Rep
        - Communication tools for team coordination
        - Option to request modification to commission structure (requires Admin approval)

Customer Management & Visibility

1. **Customer List Navigation**

    - Rep navigates to "My Customers" section
    - System displays hierarchical view of assigned accounts:
        - Organizations with expandable tree showing Facilities
        - Each entry shows key information (Name, Location, Last Order Date)
        - Status indicators highlight recent activity or opportunities
        - Search and filter controls for large customer bases

2. **Organization/Facility Detail View**

    - Rep clicks on any Organization or Facility to access detailed view
    - System displays comprehensive profile:
        - Contact information and key personnel
        - Assigned providers with ordering privileges
        - Order history with status tracking
        - Product usage patterns and preferences
        - Opportunity indicators based on ordering patterns
        - Relationship notes and interaction history

3. **Order Visibility & Tracking**

    - **Order List View:**

        - Filterable table of all orders from assigned customers
        - Status indicators showing progression through workflow
        - Quick view of key order details (Products, Value, Provider)

    - **Order Detail Access:**

        - Rep clicks any order to view details
        - System shows non-PHI order information:
            - Products and quantities ordered
            - Order status with timestamp history
            - MAC and eligibility check results (no PHI displayed)
            - Documentation completeness indicators
            - Commission calculation (if applicable)
        - Rep cannot change order details but can:
            - Add internal notes visible to MSC Admin
            - View generated documents (with appropriate permissions)
            - Monitor shipping/fulfillment status

Product Knowledge & Training

1. **Product Catalog Navigation**

    - Rep accesses "Product Knowledge" or "Catalog" section
    - System presents comprehensive product directory:
        - Grid/list view of all MSC products
        - Filter options by wound type, technology, reimbursement category
        - Search functionality for quick access
        - Featured/new product highlights
        - Commission rate indicators for sales motivation

2. **Detailed Product Information**

    - Rep selects specific product to view detailed information

- System displays comprehensive product profile:
  - Product imagery and videos
  - Complete specifications (sizes, pricing, Q-Codes)
  - Clinical indications and contraindications
  - Key features and competitive advantages
  - Application instructions and best practices
  - Supporting evidence and outcomes data
  - Downloadable resources (brochures, IFUs, training materials)

3. **Training Module Access**

   - System presents organized training resources:
     - Product-specific training modules
     - Clinical education resources
     - Competitive positioning guides
     - Selling techniques and objection handling
     - MAC coverage guidance by jurisdiction
     - Documentation requirement reference
   - Rep can:
     - Complete interactive training modules
     - Track progress through required training
     - Access quick reference guides for field use
     - Download presentation materials for customer education

4. **MSC Assist for Product Knowledge**

   - Throughout product sections, MSC Assist offers:
     - Contextual answers to product questions
     - Comparison assistance between similar products
     - Documentation requirement guidance by product/payer
     - Clinical scenario-based recommendations

Sales Support & Customer Assistance

1. **Provider Onboarding Support**

   - Rep can initiate provider onboarding:
     - Send platform invitation to new providers
     - Track registration status and completion
     - Receive notifications when providers complete registration
     - Access onboarding guides to assist customers

2. **Order Assistance Tools**

   - Rep can support providers with ordering process:
     - View provider order issues that may require guidance

        - Access educational resources about platform workflows
        - Receive notification when orders from their customers need attention
        - Collaborate with MSC Admin on resolving complex issues

3. **Opportunity Identification**

    - System highlights potential sales opportunities:
        - Customers with infrequent ordering patterns
        - Providers ordering limited product range
        - Facilities with potential for expanded product use
        - Geography-based coverage gaps

Mobile Capabilities for Field Use

1. **Responsive Mobile Interface**

    - All key functions optimized for tablet and smartphone access:
        - Commission dashboard with simplified view
        - Customer lookup with location awareness
        - Product information with offline access option
        - Order status tracking

2. **Field Sales Support**

    - Mobile-specific features for on-site customer visits:
        - Quick product reference guides
        - Customer order history access
        - Document sharing capabilities
        - Training video access optimized for mobile bandwidth

Key UI Components for Rep Portal

The Rep Portal incorporates specialized UI elements to enhance sales effectiveness:

1. **Commission Visualizations**

    - Interactive charts showing earnings trends
    - Comparative analysis views (product, customer, time period)
    - Forecast projections based on pipeline
    - Split visualization for Parent/Sub-Rep relationships

2. **Customer Relationship Management**

    - Activity timelines for customer interactions
    - Heatmaps showing ordering frequency
    - Territory visualization with performance indicators

- Opportunity scoring with visual indicators

3. **Knowledge Access Optimization**

    - Product card interfaces with quick comparison tools
    - Searchable knowledge base with guided navigation
    - Interactive training modules with progress tracking
    - Mobile-optimized resource library

4. **MSC Assist Integration**

    - Product-specific query capabilities
    - Customer situation analysis
    - Competitive positioning assistance
    - Documentation requirement guidance

Differences Between Parent Rep & Sub-Rep Experience

The system dynamically adjusts based on rep type:

1. **Parent Rep Exclusive Features:**

    - Team management dashboard
    - Sub-Rep invitation workflow
    - Commission split oversight
    - Team performance analytics
    - Broader customer/territory visibility

2. **Sub-Rep Focused Experience:**

    - Simplified commission view (personal earnings only)
    - More prominent product training emphasis
    - Customer visibility limited to assigned accounts
    - Direct connection to Parent Rep for support
    - Streamlined order tracking

This comprehensive workflow demonstrates how the MSC Sales Representative Portal empowers sales staff with the tools needed to effectively manage relationships, maximize commission earnings, and leverage product knowledge within the wound care ecosystem while maintaining appropriate separation from PHI and clinical workflows.