imagine if HEALTH

USER GUIDE

MEDICINE ACCESS PLATFORM

This user manual is designed to help you navigate the system efficiently, providing you with step-by-step guidance on configuring and managing programs effectively.

Onboarding

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Index Of Topics

INTRODUCTION TO THE PLATFORM

1.1 Platform Purpose

The Imagine If Health (IIH) platform streamlines the delivery of medicine access programs. It connects Life Science companies, physicians and pharmacies in a unified system to manage patient medication requests efficiently and securely.

Key Benefits:

- Fast and efficient medication request processing
- Configurable workflows to match business requirements
- Comprehensive reporting and tracking
- Role-based access control
- Automated notifications and alerts

1.2 Core System Components

The platform is made up of several core components that work together to streamline the management of medicine access programs. Each component plays a key role in ensuring the platform operates smoothly and efficiently. Below is an overview of the main system components and their functions:

1. Patient Request Management

This component allows physicians to submit and view patient requests to access medications. The system supports various stages of the request lifecycle, including:

- Request Submission: Physicians can submit patient requests for specific medicines, entering patient and clinical data.
- Approval Workflow: Requests are routed through approval processes, where approvers review and approve/reject them based on business rules and clinical guidelines.
- Tracking & Status Updates: Administrators and healthcare providers can track the status of each patient request (e.g., pending, approved, rejected).

2. Physician Registration

The Physician Registration component enables healthcare providers to create and verify their user accounts on the platform. This module includes:

- Registration Process: Physicians must submit their professional credentials and contact information to register.
- Verification: Registrations are reviewed and approved by administrators to ensure eligibility for submitting patient requests.
- Role Assignment: Once registered, physicians are granted the appropriate permissions to interact with the platform (e.g., submit requests, view patient details).

3. Pharmacy Management

Pharmacy Management ensures that approved patient requests are processed efficiently. This component supports the following functions:

- Pharmacy Registration: Pharmacies can be registered in the system, adding their details, contact information, and team members.
- Order Fulfillment: Once a patient's request is approved, pharmacies can submit orders for the required medications directly through the platform.
- Pharmacy Workflow: The system ensures that orders are processed according to business rules, allowing pharmacies to manage order and delivery details.

4. Program Management

The Program Management component is at the heart of the platform, allowing administrators to create, configure, and manage medicine access programs. Key features include:

- Program Creation: Administrators can define programs, including the program rules, products and limits, pricing, and patient eligibility criteria.
- Business Rules Setup: Set rules that govern the eligibility, approval, and ordering frequency for each program.
- Program Monitoring: View real-time data and reports on program performance, including patient requests, and order status and compliance.

5. User Management & Roles

This component is responsible for managing all users who interact with the platform, including administrators, approvers, observers, customer service, physicians, pharmacy staff. Functions include:

- Role-Based Access: Admins can assign roles and permissions based on job functions, ensuring that users only have access to the areas of the platform they need.
- User Registration: New users (e.g., physicians, pharmacy staff) can be registered and added to the system, and their access rights are automatically configured based on predefined roles.
- User Activity Logs: Track user actions within the platform to ensure accountability and compliance.

6. Reporting

The Reporting component enables the tracking of key metrics related to the performance of programs and user activity. Features include:

- Real-time Reports: Download detailed reports on patient requests, pharmacy orders, and other key data points.
- User Tracking: Track user updates, ensuring that actions on the platform are monitored.

7. Notifications

This component ensures that users can be informed of news and updates. It includes:

- Real-Time Notifications: Create user alerts for important actions and updates.
- Email Notifications: Automatically send notifications via email to relevant users based on predefined triggers (e.g., request approval, order placement).
- Customer Feedback: Create one-off or recurring feedback pop-ups to gather user feedback.

1.3 Platform Functionality

The platform has the following core user functionality:

- **Program Creation/Management:** Set up programs with product details, dosing regimens, order frequencies, eligibility criteria, pricing conditions and product conditions.
- **Physician Registration:** Apply to become a registered and verified user.
- **Patient Requests:** Physicians can submit requests for patient enrollment in active programs.
- **Pharmacy Accounts:** Provision of user accounts to manage program/product ordering.
- **Product Ordering:** Order products based on dosing, frequency and pricing conditions entered by the physician during patient enrollment, and according to the program rules.

1.4 Key Features

Category	Feature	Description
User and Account Management	Role-based access	• Role-based access for internal and external users. • Physician registration and authentication. • Role hierarchy for pharmacy accounts. • Profile management for all users.
Program Creation	Specialty Areas	Associate with one or more specialties.
	Indications	Associate with one or more indications.
	Products	Include one-to-many products, each with a range of dosing regimens associated with specific indications.
	Product Dosing Regimens	• Assign weight-based and/or flat-dose regimens for each product and indication. • Assign SKUs to each dosing regimen. • Allow fixed or flexible order quantities for each dosing regimen. • Automatic SKU calculations for weight-based doses.
	Loading & Titration Schedules	Define custom order rules for product loading and titration doses.
	Ordering Frequencies	Set the reordering frequency for each product dosing regimen (weekly, monthly etc).
	Pricing Models	Choose from several pricing structures: Free, alternate paid/free orders, threshold-based pricing, or Buy X orders, Get Y orders free.

	Product Limits	Set a maximum number of orders for products and indications.
	Clinical Benefit	Set clinical benefit assessment based on price or order thresholds and trigger once or multiple times.
Program Management	Program control	Start and stop programs in real-time or according to a scheduled date. Pause and amend programs on-demand.
	Product Inventory Control	Comprehensive management of products including dosing regimens, SKUs, product codes, prices, and frequencies.
	Pharmacy Management	• Manage program ordering via decentralised or centralised pharmacies. • Manage orders with fixed or variable ordering controls and pre-determined order frequencies.
	Approval Workflow	Assign approvers to manage new patient requests.
	Flexible Program Closures	Close programs to new enrollments while maintaining existing patients, or completely close a program and cancel associated orders.
Order Processing		• Place and track patient orders with a user-friendly dashboard. • Automated pricing calculator for accurate pharmacy ordering. • Customisable order forms for 3PL providers. • Customer Service can override order details.
Eligibility & Compliance		• Custom physician registration opt-in questions. • Custom program eligibility criteria for patients and physician opt-ins. • Supports document upload on patient requests (e.g., SAS Forms). • Display Adverse Events requirements to users. • Set age restrictions for programs. • User and activity logging.
Branding and Communication		• Customise branding (logos, colours, etc.). • Automated email alerts for program updates, patient requests, and orders. • Display resources for physicians and pharmacies.

		• Schedule pop-up notifications by user type.
Reporting	Report Factory	Generate on-demand portal and program reports.
	Program & product codes	Maintain product and program-specific codes to support internal reporting requirements.
	Feedback module	Automatic feedback collection by user type.

1.5 User Roles and Permissions

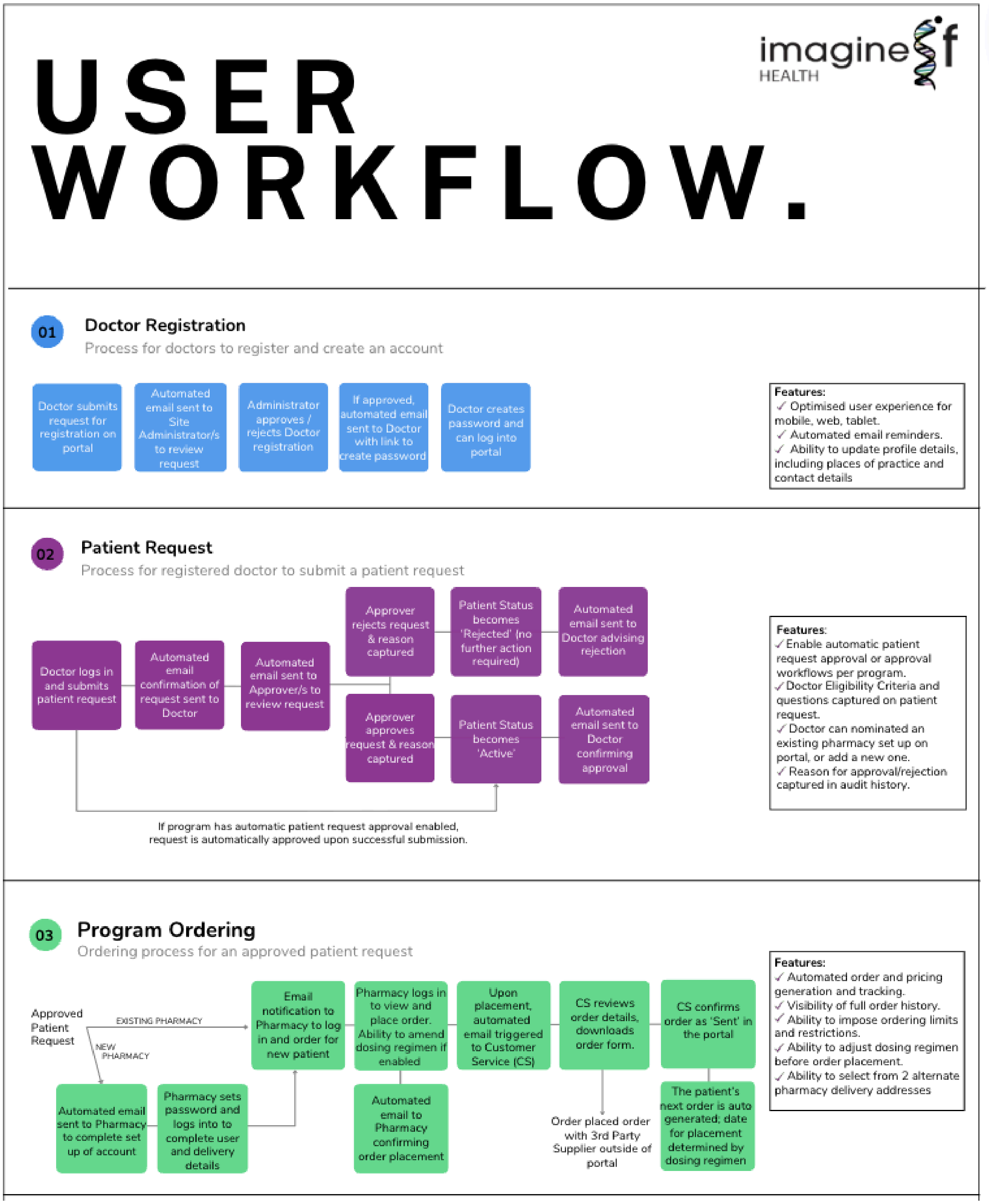
1.5.1 Overview of Roles

User Type	Description	Abilities/Permissions
Administrator	Full access to all features and settings	• Configure platform settings (including colours, images, welcome text, footers) • Manage all users and roles • Set up specialities, indications, products and programs • Approve/reject new physician registrations • Create, view, amend, and deactivate physicians, pharmacies and institutions • View, approve/reject, amend and cancel all patient requests • View and update orders before they are Sent • Create bespoke 3PL order form templates • Submit, view, update clinical benefit assessments • Access reports • Manage and view resources
Customer Service	Handles order processing and user support	• View all patient requests • Update patient details and nominated pharmacy on patient requests • View and update all orders before they are Sent • Manage 3PL order form templates • Create, view, amend, and deactivate pharmacies, physicians and institutions • View all Resources
Approver	Responsible for approving or rejecting patient requests	• Approve / reject patient requests • View all patient requests and orders • Manage physicians and institutions • View resources
Observer	View-only role with access for monitoring purposes	• View all patient requests and orders • View resources • No ability to make changes
Physician	Creates, views, and manages patient requests	• Create, view and cancel patient requests • Track linked patient orders • Complete clinical benefit assessments • View resources
Pharmacy (Primary)	Manages order processing	• View, submit and track orders • View linked patient requests • View and update pharmacy details • View resources
Pharmacy (Team Member)	Assists the pharmacy in fulfilling orders	• View, submit and track orders • View linked patient requests • View pharmacy details • View resources • No access to update pharmacy details

1.5.2 Detailed Permissions Breakdown

Action	Admin	Customer Service	Approver	Observer	Physician	Pharmacy (Primary)	Pharmacy (Team Member)
View PRs	✓	✓	✓	✓	✓ (Ltd)	✓ (Ltd)	✓ (Ltd)
Approve/Reject PRs	✓	X	✓	X	X	X	X
Amend Active PRs	✓	✓	X	X	X	X	X
Cancel PRs	✓	X	X	X	✓	X	X
Create Physicians	✓	✓	X	X	✓	X	X
View/Amend/ Deactivate Physicians	✓	✓	✓	X	X	X	X
Manage Institutions	✓	✓	✓	X	X	X	X
View Orders	✓	✓	✓	X	✓	✓	✓
Submit Orders	✓	✓	X	X	X	✓	✓
Amend Orders	✓	✓	X	X	X	✓ (Ltd)	✓ (Ltd)
Create Order Form Templates	✓	✓	X	X	X	X	X
Create Pharmacies	✓	✓	X	X	✓	X	X
View Pharmacies	✓	✓	X	X	X (Ltd)	X	X
Update Pharmacy Details	✓	✓	X	X	X	✓ (Ltd)	X
Action Clinical Benefit Assessment	✓	X	X	X	✓	X	X
Amend Clinical Benefit	✓	X	X	X	X	X	X
View Resources	✓	✓	✓	✓	✓	✓	✓
Manage Resources	✓	X	X	X	X	X	X
Manage Internal Users	✓	X	X	X	X	X	X
Access Reports	✓	X	X	X	X	X	X
Manage Portal settings	✓	X	X	X	X	X	X
Manage Specialties	✓	X	X	X	X	X	X
Create, Edit, and Deactivate Programs	✓	X	X	X	X	X	X
Manage Product Inventory (Add/Edit Products and Doses)	✓	X	X	X	X	X	X
Manage Notifications	✓	X	X	X	X	X	X

1.6 Typical User Workflow



1.7 Platform Navigation and Interface

1.7.1 Main Navigation Menu

The platform features a top navigation bar with access to:

- **Patient Requests** – View and manage patient requests for medicine access.
- **Orders** - View and manage orders for medicine access.
- **Resources** - View and manage resources for portal users.
- **Profile** - View and manage profile information.
- **Physicians** - Manage physicians.
- **Institutions** - Manage physician places of practice.
- **Pharmacies** - Manage pharmacies and their users.
- **Specialities** - Create and manage Specialities for physicians and products.
- **Indications** - Create and manage indications for products and programs.
- **Products** - Create and manage product inventory to fulfil programs.
- **Programs** – Create, manage, and monitor medicine access programs.
- **Order Form Templates** - Create and manage order form templates for 3PL providers.
- **Site Questions** - Create and manage portal physician registration questions.
- **Reports** – Access detailed reports on demand.
- **Notifications** - Create pop-up notifications for user groups.
- **Settings** – Customise portal settings, including logo, colours, messages, site footers.
- **Users** - Manage internal user roles.

Menu	Admin	Customer Service	Approver	Observer	Physician	Pharmacy
Patient Requests	✓	✓	✓	✓	✓	✓
Orders	✓	✓	X	✓	✓	✓
Resources	✓	✓	✓	✓	✓	✓
Profile	✓	✓	✓	✓	✓	✓
Settings	✓	X	X	X	X	X
Users	✓	X	X	X	X	X
Physicians	✓	✓	✓	X	X	X
Institutions	✓	✓	✓	X	X	X
Pharmacies	✓	✓	X	X	X	X
Specialities	✓	X	X	X	X	X
Indications	✓	X	X	X	X	X
Products	✓	X	X	X	X	X

Programs	✓	X	X	X	X	X
Order Form Templates	✓	✓	X	X	X	X
Site Questions	✓	X	X	X	X	X
Reports	✓	X	X	X	X	X
Notifications	✓	X	X	X	X	X

1.7.2 Using The Search Function

Access the search bar in the top right to quickly find:

- Patient requests
- Orders
- Physicians, institutions, pharmacies and users
- Specialities, indications, products, and programs
- Resources
- Notifications
- Reports

1.8 Managing Dates and Time

The portal handles dates and times with consideration to both user local time and system time, ensuring seamless operations across different regions. Below is an overview of how dates and times are managed within the portal:

1. User Action Recordings and Local Time: All recorded user actions, such as those displayed in the Administration Tracker and Order Override History, are presented in your local time zone. This ensures that actions are easy to interpret based on the time zone of the user interacting with the system.
2. System-Specific Dates: Certain system settings are set and stored in Australian Eastern Standard Time (AEST). These dates are used for internal processes, ensuring consistency across the system regardless of the user's local time zone.
   - Program Start and End Dates: These represent the beginning and end of any scheduled programs.
   - Notification Start and End Dates: Used for setting the timing of notifications.
   - Order Unlock Dates: When orders are unlocked for processing.
3. Reports: All dates displayed in reports are displayed in Australian Eastern Standard Time (AEST).
4. UTC Time for Database Records: The portal records all time-related data in Universal Time Coordinated (UTC) in the database to ensure uniformity. Once data is recorded in UTC, it is then converted to the appropriate time zone for display purposes based on the user's location.

2 GETTING STARTED

2.1 Understanding Staging v.s Production Environments

The medicine access portal provides two distinct environments, serving distinct but complementary roles to ensure the smooth and secure delivery of services:

1. Staging Environment
- A secure testing environment that mirrors the production site
- Used for testing new features and programs before public release
- Allows simulation of real-world scenarios without affecting live operations
- Access restricted to authorised client users only

2. Production Environment
- The live, public-facing environment
- Contains only fully tested and verified features
- Used for all regular business operations

2.2 Initial Account Set Up

Your organisation's first Administrator account will be created by IIH. You'll receive an automated email with password setup instructions. Once active, this Administrator can create additional user accounts in both Staging and Production environments.

2.3 Accessing the Portal

1. Go to the site's homepage and click **LOGIN.**
2. Enter user email address and password.
3. Click **Sign In.**

If you enter incorrect credentials, you'll see the message: "Invalid username or password".

Note: During server updates, the Staging site may display an all-black login screen requiring a generic temporary password. Contact IIH if you need this password, noting the password will not change.

2.4 Password Recovery

If you forget your password:
1. Click **Forgot password** on the **LOGIN** screen.
2. Check your email for the reset link.
3. Click on the link to set a new password.
4. Complete the password reset within one hour (links expire after 60 minutes)

2.5 Internal User Management and Role Assignment

Administrators can create four internal user types: Administrator, Customer Service, Approver, and Observer. (See Section 1.5 for user roles and permissions.)

2.5.1 Adding New Users

1. Go to **USERS**.
2. Locate required User Type and click **Add New**.
3. Enter the new user's details and click **Submit**. They will receive an email to set a password.

2.5.2 Managing Existing Users

To edit user details:

1. Go to **USERS**, find the **User Type** and locate the user.
2. Click **View**, then click the **Edit** to update their details. Note: not all fields are mandatory.
3. Click **Submit** to save.

To deactivate a user:

4. Go to **USERS**, find the **User Type** and locate the user.
5. Uncheck their **Status** box in the user list. Alternatively, click **View** then **Reject User**.

2.6 Updating Your Profile Information

1. Go to the Gear icon and click **PROFILE**.
2. Update details.
3. Click **Submit**.

3 CUSTOMISING SITE ELEMENTS

3.1 Configuring Site and Homepage Settings

Navigate to the SETTINGS menu (located in the Gear icon) to configure the following site-wide elements:

- **Site Name**: used as the site title tag, homepage heading, email notification subject lines.
- **Site Welcome**: Configure separate messages for non-logged users and logged in users.
- **Site Disclaimer** and **Site Approval Number(s)**: displays in the footer.
- **Site Theme Colours** for:
  - Primary theme colour (main brand colour).
  - Secondary theme colour (accent colour for select buttons).
  - Header Bar background colour.
  - Header Image background colour (appears behind logo).
- **Site and Email Logo**: appears in portal header and email notifications.
- **Homepage Image:** displays on homepage.

3.2 Footer Management

Administrators access footer content management through the **SETTINGS** menu. Rich text formatting is available for all sections.

Public Footer Sections:
- Privacy: Legal privacy information (supports URL links, no file uploads).
- Terms: Usage terms and conditions (supports URL links, no file uploads).
- Contact Us: Contact form and information (requires email configuration for form submissions by IIH).

Authenticated Footer Section:
- Adverse Events: Only visible to logged-in users.

3.3 Configuring Physician Registration Questions

The physician registration form is pre-templated by the system, but administrators can create custom questions through the **SITE QUESTIONS** menu.

Question Categories
- Global Questions: apply to all physicians.
- Country-specific questions: apply specifically to Australian or New Zealand physicians.

To set up site registration questions:
1. Go to **Site Questions**.
2. In the table, click **View** to select either global questions (**Doctor Registration Opt-in Terms**) to Country specific questions.
3. To add a new question, click **Add New**.

    a. Enter a unique question **Name** (not visible to users).
    b. Select the question **Type**.
    c. Enter the question **Text** (255 character limit).
        - For **Checkbox** question types, use rich text to display hyperlinks, e.g, [link href='https://example.com' newTab='true']link[/link]. Add the text to display as the link text in the **Link Text** field.
        - Responses: For dropdown/radio questions, separate **Responses** with commas.
    d. **File Type**: Set to **No File** (public facing pages cannot upload documents for security).
    e. Check **Required** to make the question mandatory.
    f. Check **Hide Question Once Answered** to remove it from view once completed.
    g. Check **Lock Question Once Answered** to prevent future edits to responses.
    h. Make question active (visible) or inactive (not visible) via **Status**.
    i. Click **Submit** to save the question.
4. Reorder questions as needed using the **Question Layout** feature.

To edit an existing question:

1. Click **Edit** in the table for the question.
2. Make necessary changes
3. Click **Submit** to save the question.

Note: physicians can view and update their responses via their **PROFILE**, unless the question is 'locked'. Administrators cannot view physician responses.

Compliance Considerations:

- Making a Question Inactive: When a question is deactivated, it will still appear on previously submitted registrations that were completed prior to the change.
- Editing the 'Text' Field: Modifying the text of a question will result in the updated wording being reflected on both new and previously submitted registrations. The impact of these changes on physicians who have already registered should be considered. It may be preferable to deactivate the question and create a new one instead.

3.4 Email Notification System

Email notifications are automatically generated and triggered by system events, including:

Physician Notifications

1. Registration Request Received: Notification that their registration request has been submitted.
2. Registration Approved: Confirmation that their registration has been approved and link to set password/login.
3. Registration Rejected: Notification that their registration has been rejected.
4. Patient Request Received: Confirmation that their patient request has been received and is pending review.
5. Patient Request Approved: Confirmation that their patient request has been approved and ordering can proceed.

6. Patient Request Rejected: Notification that their patient request has been denied.
7. Clinical Benefit Required: Notification indicating that patient clinical benefit assessment is needed.
8. Patient Request Withdrawn: Notification that their patient request has been cancelled in the portal.

Pharmacy Notifications

9. Pharmacy Set Password: Instructions for new pharmacies to set their password and confirm their details.
10. Team Member Set Password: Notification to new pharmacy team members to set their password.
11. New Patient Enrolled: Notification that a patient has been enrolled and the pharmacy has been nominated for ordering.
12. Patient Request Updated: Notification that a patient request has been updated and the pharmacy has been assigned (applicable when the pharmacy is updated by an Administrator).
13. Order Confirmation: Confirmation of order placement.
14. Delivery Pharmacy Order Confirmation: Notification to an ‘alternate delivery pharmacy’ if they have been assigned as the delivery location for an order by the ordering pharmacy.
15. Clinical Benefit Notice: Notification that a patient clinical benefit assessment is required by the treating physician before any more orders can be placed.

Internal User Notifications

16. Review Physician Registration: Notification to Administrators that a new physician has registered and requires review.
17. New Patient Request Submitted: Notification to Approvers that a new patient request has been submitted by a physician for review.
18. Order Submitted: Notification to Customer Service that an order has been submitted and needs to be placed for delivery.
19. Clinical Benefit Assessment Submitted: Notification to Administrators that a physician has submitted a clinical benefit assessment.
20. Approver Set Password: Instructions for new users to set a password.
21. Customer Service Set Password: Instructions for new users to set a password.
22. Observer Set Password: Instructions for new users to set a password.

All User Notification

23. Password Reset: Instructions for users to reset their password.

Email Customisation

- Configure email signature through **SETTINGS** → **Email Footer Signature**
- All templates use standardised design with dynamic field population
- Manual email generation is not supported

4 SPECIALITIES

4.1 Overview

A Specialty is a therapeutic area (such as Oncology, Cardiology, etc.) that:

- Links physicians to their areas of medical practice.
- Associates products with relevant medical fields.
- Controls physician access to specialty-specific programs.

Once a Speciality is created, it can be deactivated on the registration page. However, it will still be visible and selectable on physician profiles.

4.2 Adding A New Speciality

To add Specialities:

1. Go to **SPECIALITIES** click **Create**.
2. Enter the **Name** of the speciality.
3. Set the **Status** as **Active** to make it available for selection.
4. Click **Submit.**

4.3 Deactivating A Speciality

To deactivate a Speciality from being displayed to new physicians at registration:

1. Go to **SPECIALITIES** click **View**.
2. Click Edit.
3. Change the **Status** as **Inactive**.
   - It is removed from the physician registration form.
   - It remains available to registered physicians.
4. Click **Submit.**

5 INDICATIONS

5.1 Overview

An Indication defines the specific medical condition or purpose for which a product is used. Indications are critical because:

- Must be linked to product dosing regimens before setting up programs.
- Each product dosing regimen requires at least one linked indication.
- Active indications are displayed to physicians during patient request creation.
- Help ensure appropriate product usage within programs.

5.2 Adding Indications

1. Go to the **INDICATIONS** menu and click **Create**.
2. Enter the indication **Name** (displays to physicians).
3. Enter a **Description** for the indication (for Administrative use).
4. Enter indication **Type**, eg ‘on-label’ or ‘off-label’ (for Administrative use).
5. Set the **Status** as **Active**.
6. Click **Submit.**

5.3 Deactivating Indications

1. Go to the **INDICATIONS** menu and search for the indication.
2. Click View
3. Click Edit
4. Change the **Status** to **Inactive**.
5. Click **Submit**.

Important Notes: When an indication is deactivated

- It is removed from new patient request options.
- It remains unchanged in existing active patient requests.
- It can be reactivated if needed.

6 PRODUCT INVENTORY MANAGEMENT

6.1 Product Setup

Setting up a product involves three main steps:

1. Creating a Product Summary
2. Configuring Product SKUs
3. Establishing dosing regimens and linking SKUs to them.

6.2 Creating Product Summaries

The product summary includes basic details about the product that will be used across programs.

To Create a Product Summary:

1. Go to **PRODUCTS** and click **Create**.
2. Enter the product **Name** (this is not displayed to physicians or pharmacies).
3. Enter urls for **CMI**, **Product Information** and **Data Sheet**.
4. Select a **Product Colour** that is used for visual identification in requests and orders.
5. Select the **Product Speciality(s)** (determines physician access based on their registered specialties)
6. Select **Status** as **Active**. Note: once a product is added, it cannot be removed.
7. Click **Submit**.

6.3 Adding Product SKUs

Product SKUs are essential for making a product orderable:

- Provides a unique identifier for each specific variation of a product (e.g., different strengths, pack sizes, or formulations)
- Ensures patients receive the correct medication format for their prescribed regimen
- Enables logistics providers to accurately identify and pick specific products for orders
- Allows for different price for different product formats
- Enables accurate order reconciliation

To Create a Product SKU:

1. In the product, scroll to the **Product SKU** section and click **Add New**.
2. Enter the **Name** (displays in the product details on patient requests and orders).
3. Enter a **Description** (also appears in patient requests and orders).
4. Enter the **Product SKU** Number (used for Order Forms).
5. Enter **Free Order Code** if applicable (used for Order Forms).
6. Free **Paid Order Code** if applicable (used for Order Forms).
7. Enter the numeric **Size** of the product SKU (displays in the product details on the patient requests and orders). Eg if it is a 400mg vial, enter 400.
8. Select **Measurement** type (displays in the product details on patient requests and orders).
9. Select **Storage Type** (used on Order Form).

10. Select **Container Type** (displays in the product details on patient requests and orders).
11. Enter **Unit Price** (displays in the product details on patient requests and orders unless overridden by program **Pricing Conditions**).
12. Click **Submit**.

Note: SKUs cannot be deleted once created. To discontinue a SKU, remove its association with dosing regimens. Refer Section 6.4.1.

6.4 Adding Dosing Regimens

Dosing regimens specify how a product should be taken or administered.

To set up a Dosing Regimen:

1. In the product, scroll to the **Dosing Regimen** section and click **Add New**.
2. Enter the **Name** (displays for physician selection on patient requests and by pharmacies on orders)
3. Enter a **Description** (appears as a dosing regimen tooltip on patient requests and orders)
4. Select **Type**: Choose the type of dosing regimen:
   - Weight-Based: Dosing calculated by patient weight.
   - Non Weight-Based (flat dose): A fixed dose.
   - Non Weight-Based Variable: Flexible ordering quantity. If **Multiple Frequency By Quantity Ordered** is selected, the order frequency is adjusted by the quantity ordered. (e.g., if the frequency is every 7 days and quantity 2 is ordered, the next supply will be due in 14 days).
5. Select **Frequency of Supply**: Set reorder cycle length.
   - If Non Weight-Based Variable is selected as the **Type**, choose whether to multiply the frequency of supply by the quantity ordered. E.g, if the 'Frequency of Supply' is QW and a quantity of 2 is ordered, the next due date will be 7 x 2 = 14 days.
6. Enter **Unit Of Measure** (Note if weight-based dosing is selected, mg/kg is automatically applied).
7. Enter **Dose Strength**.
8. Select **Indications**: Choose which indications this regimen applies to.
9. Associate SKUs: Link the specific SKUs to fulfil the regimen
   - For **weight-based** regimens, the system automatically calculates the total required dose and selects the most efficient SKU/s based on lowest price, lowest wastage, then lowest vial count.
   - For **non weight-based variable** regimens, enter the minimum and maximum order quantities.
10. Set **Status** as **Active** (selectable) or **Inactive** (not selectable).
11. Click **Submit**.

6.4.1 Changing Product SKUs on Dosing Regimens

To remove/replace a product's SKU (e.g., due to discontinuation or stock issues):

1. Go to the **Product** menu and find the relevant product.

2. Ensure the new SKU is set up, or add it as required.
3. Click into the product's **Dosing Regimen** and remove the old SKU using the Bin icon.
4. Select the new SKU from the dropdown list.
5. Click **Submit** to save to apply to all future product orders.

7 ORDER FORM MANAGEMENT

7.1 Overview

Order forms are essential documents that:

- Enable Administrators and Customer Service to request order fulfillment.
- Generate standardised requests to 3PL (third-party logistics) providers.
- Can be customised for different programs' specific requirements
- Ensure accurate and efficient order processing

7.2 Creating Order Forms

1. Go to **ORDER FORM TEMPLATES** and click **Create**.
2. Complete the following required fields:
    - **Name**: This will appear as the form title
    - **Description**: Provides context about the form's purpose
    - **Sponsor Contact**: Enter contact details for the program sponsor
3. Select display fields:
    - Choose which fields should appear on the order form using the checkboxes
    - Selected fields will automatically populate with program or patient order details when the form is used
4. Click **Submit**.

GST Calculation

- System automatically calculates GST based on the ordering pharmacy's country:
    - Australia: 10% GST
    - New Zealand: 15% GST
- GST appears on order forms when enabled in the template settings.

7.3 Managing Existing Order Forms

1. Go to **ORDER FORM TEMPLATES.**
2. Select **View** to see a sample of the form.
3. Select **Edit** to modify the form's displayed fields.

8 PROGRAM CREATION

8.1 Understanding Program Statuses

A program can have one of three possible statuses:

1. **Active**: The program is currently active and, depending on the date parameters, may fall into one of the following stages:
   - “Ready”: Waiting for the start date to be reached (Administrators can preview the program on ‘Create Patient Request’, indicated by "(Preview)" next to program name)
   - “Live”: Currently running
   - “Completed”: Past end date (and therefore no longer visible for new requests but existing patient orders remain active).
2. **Inactive**: Not visible or available for new requests.
3. **Closed**: The program is closed by an Administrator and therefore is not visible or selectable for new requests, and active orders are cancelled.

8.2 Setting Up A Program

8.2.1 Steps to Prepare for Program Creation

Administrators create new programs through the **PROGRAM** menu. Before creating a program, ensure that all prerequisites are completed:

1. Configure Speciality areas.
2. Set up required Indications.
3. Add products with SKUs and dosing regimens.
4. Prepare order forms (if required).

8.2.2 Define Program Details

1. Go to **PROGRAMS** and click **Create**.
2. Enter a unique program **Name** to display to all users.
3. Select **Countries** where the program is available. The program will be visible only to physicians registered to these countries, and they will only be able to select pharmacies that are also registered in those countries. Physicians will only be able to select pharmacies that are registered in the same countries. For multi-country programs, physicians can view and select pharmacies from any of the selected countries
4. **Description For Doctor**: displays when creating patient requests.
5. **Description For Pharmacy**: displays on program orders.
6. Select the program **Start** and **End Dates**. These are based on AEST time:
   - The program will activate at 12:00 AM on the Start Date.
   - The program will end at 11:59 PM on the End Date.
7. Enter **Program Codes** (used for Order Forms).
8. Check **Patient Request Auto Approval** to auto-approve patient requests when submitted. If unchecked, patient requests require approval before becoming Active.
9. Select **User Type With Ordering Permissions**: choose the user responsible for ordering.
10. Select **Pharmacy Management Type**:

- **Centralised Pharmacy Management**: Only designated pharmacies will be available for selection on patient requests.
- **Decentralised Pharmacy Management**: Any registered pharmacy can be selected.

11. Enter **Minimum Patient Age** (automatically validated against the patient's date of birth).
12. Select the **Ordering Type**:
    - **Fixed**: **Carry Forward First Dosing Regimen (Orders Are Locked)**: The dosing regimen selected by the physician cannot be changed by the pharmacy in future orders, though patient weight or supply quantity can be amended;
    - **Variable: Carry Forward First Dosing Regimen (Orders Can Be Amended)**: the physicians selected dosing regimen will display on orders, and can be amended;
    - **Variable: Carry Forward Last Dosing Regimen (Orders Can Be Amended)**: the most recently ordered dosing regimen will show on the order, and can be amended;
    - **Variable: No Dosing Regimen Carried Forward (Orders Can Be Amended)**: no dosing regimen will show on orders and the orderer must select each time
13. Enter **Early Order Placement Period (Days)**: This is the number of days before the next order's due date that it can be submitted.
14. Select **Pricing Conditions Type**: Choose whether the program is free or has specific pricing rules.
15. Select **Order Form Template** from the available list.
16. Select **Program Type**: this is displayed on patient requests and orders.
17. Select **Status**.
    - Note: If set to Active, the program will go live once the start date is reached. Even if not live, Administrators can preview the program (indicated by '(Preview)' next to the program name in the Program dropdown).
18. Click **Submit**.

After submitting, scroll down to enter specific details for Products, Product Limits, Pricing Conditions, Questions and Clinical Benefit.

8.2.3 Adding Products and Dosing Regimens

8.2.3.1 Initiation Products & Dose Regimens

Overview:

- Select the products, indications, and dosing regimens that will appear on new patient requests and orders, including loading doses.
- If a dosing regimen should not be available for selection on the **Create Patient Request**, do not add it here. See Section 8.2.3.2 to add custom dosing regimens to specific orders.
- Ensure product details are set up in the Product menu before commencing.

To set up initiation products and doses:

1. In the program's menu, go to **Initiation Product & Dose Selection** and click **Add New**.
2. Enter the product **Name** as it should appear to physicians and pharmacies.
3. Select the product from the available **Product** dropdown list.
4. Select the dosing regimens to display in the patient request from the **Dosages** dropdown.
5. Select the **Indication(s)** for each dosing regimen.

6. Add one- to many- dosing regimens.
7. Set **Status** to **Active**.
8. Click **Submit**.
9. Repeat steps to add additional products for combination therapy programs.

8.2.3.2 Adding Product & Dose Variations to Specific Orders

Overview:

- **Product & Dose Variations** allows custom dosing regimens (e.g., titration) to be applied to specific orders. These variations can either supplement or replace the standard ordering schedule.
- This applies only to orders, not to patient requests.
- Only products that have been added to **Initiation Products & Dose Regimens** and are being actively ordered by the pharmacy can use variations. New products cannot be added here.

To set up a dosing variation:

1. In the program's menu, go to **Product & Dose Variations** and click **Add New**.
2. Enter a **Name** that will be displayed in the Product field on the associated orders.
3. Select a **Selection Type**:
   - **Fixed:** A single, unchangeable dosing regimen (patient weight and variable quantities can still be adjusted).
   - **Variable:** Allows multiple regimen options.
4. Specify the **Order(s)** to apply the condition to:
   - For a single order, enter a single number (e.g., 2).
   - For multiple orders, separate numbers with commas (e.g., 2, 4).
   - For an order range, use hyphen (e.g., 2-4).
   - For unlimited orders, use an asterisk (*) (e.g., 2-*).
5. Select the **Product** to apply the condition to (noting the Feature Rules above).
6. Select the product **Dosing Regimen(s)** to apply the condition to. (Reminder: If **Fixed** is chosen as the **Selection Type**, only one dose can be selected, if **Variable** is selected, multiple doses can be chosen.)
7. Select the **Indications** for each dosing regimen(s).
8. Set the **Status** to **Active** to enable the condition for the program.
9. Click **Submit**.

Repeat for other orders and dosing regimens as needed.

✏️ *EXAMPLE*

This is an example of setting up a single, mandatory dose of '240mg Q4W' for 'Product A' which will be provided at Orders 3, 4 and 5 only:

- Name: Product A
- Condition Type: Fixed
- Orders: 3-5

- Product: Product A
- Dosages: 240mg Q4W
- Indication: *Select relevant indication for the dosing regimen to display*
- Status: Active

8.2.3.3 Setting Up a Loading Dose (example)

This example demonstrates how to set up a loading dose of '240mg Q4W' for 'Product A' which will be displayed on the Patient Request and Order 1 only, and then all subsequent orders revert to '120mg Q4W':

Step 1: Set Up the Initial Dose

1. Go to **Initiation Products & Dose Regimens**.
2. Select **Add New+** and enter the following information:
   - Name: Product A
   - Product: Product A
   - Dosages: 240mg Q4W
   - Indication: Select relevant indication for the loading dose to display
   - Note: if another dose is to be made available (eg if the loading dose is optional), add another Dosage and Indication for the alternate option.
   - Status: Active
3. Click **Submit**.

Step 2: Set Up Dosing Variations

1. Go to **Product & Dose Variations**.
2. Select **Add New+** and enter the following information:
   - Name: Product A
   - Condition Type: Fixed
   - Orders: 2-*
   - Product: Product A
   - Dosages: 120mg Q4W
   - Indication: Select relevant indication/s
   - Status: Active
3. Click **Submit**.

This setup ensures that 240mg Q4W will appear only for the first order (Patient Request and Order 1), and all subsequent orders will display the default dose of 120mg Q4W.

8.2.3.4 Setting Up a Titration Dose Schedule (example)

This example demonstrates how to set up a program titration dosing scheduling that has a set dose of 5mg for the Patient Request and Order 1, allows the options of 5mg and 10mg for orders 2 and 3, and then allows the options of 5mg, 10mg and 15mg for all subsequent orders.

Step 1: Set Up the Initial Dose

1. Go to **Initiation Products & Dose Regimens**.
2. Select **Add New+** and enter the following information:
   - Name: Product A
   - Product: Product A
   - Dosages: 5mg
   - Indication: Select relevant indication/s
   - Status: Active
3. Click **Submit.**

Step 2: Set Up Dosing Variations

1. Go to **Product & Dose Variations**.
2. Select **Add New+** and and enter the following information for Orders 2 and 3:
   - Name: Product A
   - Condition Type: Variable
   - Orders: 2-3
   - Product: Product A
   - Dosages: 5mg, 10mg
   - Indication: Select relevant indication/s
   - Status: Active
3. Click **Submit**.
4. Select **Add New+** again and enter the following information for Orders 4 and onwards:
   - Name: Product A
   - Condition Type: Variable
   - Orders: 4-*
   - Product: Product A
   - Dosages: 5mg, 10mg, 15mg
   - Indication: Select relevant indication/s
   - Status: Active
5. Click **Submit**.

8.2.4 Setting Pricing Conditions

Overview:

- Pricing conditions define rules for program costs. This is not required if the program is free or or follows the standard SKU pricing set in the **Product** menu.
- Pricing Rules are set by product (one rule per product) and can include:
  - Financial/Order Thresholds: Orders are charged until a financial or order threshold is reached, then all subsequent orders are free
  - Alternating Orders: Orders alternate between paid and free (or vice versa) until a financial or order threshold is reached, then all subsequent orders are free
  - Buy X Orders, Get Y Orders Free
  - Get X Orders Free, Buy Y Orders.

To set up a pricing condition:

1. In the program, go to **Pricing Conditions** and click **Add New**.
2. Enter a **Name** (not visible to users).
3. Select the **Order Type** that the price rule will apply to once it's been activated (e.g. every order)
   - Important: If 'Odd Orders' or 'Even Orders' is selected, the alternate order starts and remains free for the entire duration of the program. E.g, this allows the activation of alternate order free up to a threshold before all orders become free. Refer example below.
4. Select the **Action** that will be applied to the orders once the threshold is met - currently only 'Free of Charge' is available.
5. Select the **Price Rule Type.** Choose a threshold-based trigger to activate free of charge offerings or Buy/Free order options.
6. Enter the **Value**:
   - For threshold-based rule types, enter the number of orders or the price required to trigger the cap.
   - For Buy/Free rules, specify the number of free or paid orders (corresponding to the first value in the set up.
7. From the **Duration Type** dropdown, choose how long the rule remains active once activated, i.e. the number of orders placed, number of dosage weeks or select 'Continues for Program Duration' if there's no limit. If 'Continues' is chosen, move to Step 10.
   - Important: For Paid/Free Orders threshold type, 'Orders Placed' must be selected to set the number of paid to free (or vice versa) orders. Refer example below.
8. Enter the **Duration Value** to define how the duration length:
   - For threshold-based rules, enter the number (of weeks or orders) for the FOC ordering period.
   - For Buy/Free rules, specify the number of free or paid orders (corresponding to the second value in the buy/free setup)
9. Select the action that occurs once the **Duration Is Met**. Note: 'Repeat' is only applicable for the Threshold Types 'Paid Orders' and 'Free Orders'.
10. Select the **Product** this pricing condition applies to.
11. Set **Status** to **Active** and click **Submit.**

✏️ *CONFIGURATION EXAMPLES*

Buy 1 Get 2 Free, run for the duration of the program

Name: Buy 1, Get 2 Free
Action Applies to Order Type: Every Order
Action When Threshold Is Met: Free Of Charge
Price Rule Type: Buy X Orders, Get Y Free
Value (Number Of): 1
Duration Type: Orders Placed
Duration Value (Number Of): 2
Action When Duration Is Met: Repeat

All Orders become FOC for 12 orders, after a financial threshold of $10,000 is reached
Name: FOC Threshold
Action Applies to Order Type: Every Order
Action When Threshold Is Met: Free Of Charge
Price Rule Type: Financial Threshold
Threshold Price: $10,000
Duration Type: Orders Placed
Duration Value (Number Of): 12
Action When Duration Is Met: Complete Patient Request

Every even order is FOC, until a threshold of 10 orders is reached, then all orders are FOC
Name: FOC Threshold
Action Applies To Order Type: Odd Orders (Even Orders Always Free In Program)
Action When Threshold Is Met: Free Of Charge
Price Rule Type: Order Threshold
Value: 10
Duration Type: Continues For program duration

8.2.5 Setting Product Ordering Limits

Overview:

- Product limits restrict how many orders a product can have within the program.
- Multiple limits can be added for different products and indications.
- When a limit is reached, the program will stop generating orders for that product.
- When all limits are reached for the patient, the patient request status will update to 'Complete'.

To set a Product Limit:

1. In the program, go to **Product Limits** and click **Add New**.
2. Enter a **Name** (not visible to users).
3. Set the **Order Limit Value**: Enter a number to set the order limit.
4. Select the **Limit Type**: Choose 'Orders' to limit the quantity of orders.
5. **Action When Limit Met**: Choose 'Product Completed' to stop orders once the limit is reached.
6. Select **Indication**: Choose the specific indication or check **Apply Limit to All Indications**.
7. Select **Product** this limit applies too.
8. Set **Status** to **Active** and click **Submit**.

8.2.6 Adding Program Questions

Overview:

- Program questions gather data at different stages of the program including:
  - **Create Patient Request**: Eligibility Criteria (displayed to physicians)
  - **Create Patient Request**: Opt-in Questions (displayed to physicians)
  - **Orders**: Order Conditions (displayed to pharmacies)

- Once answered, responses to questions are displayed on the submitted Patient Request or completed Order, visible to all users.
- There are seven question types: Free Text, Checkbox, Dropdown, Document, Radio, Multi-Radio, Date.
- Questions can be mandatory or optional.
- Questions can be applied to all, or select indications.

To set up Questions *(Fields may vary depending on selected options):*

1. In the program menu, scroll to **Question Builder** and click **Add New**. As you build the question you can view it in the Live Question Editor.
2. Enter a unique question **Name**. This name will appear as placeholder text in the input field of a 'Free Text' question before the user starts typing. It will also appear in reports providing a unique name has been used.
3. Select question **Type**.
4. Enter question **Text** (255 character limit).
    - Use rich text to display a hyperlink in a **Checkbox** question **Type**. For example: [link href='https://example.com' newTab='true']link[/link] and then add the text that you want to display as the link in the Link Text field.
5. **Responses**: For dropdown or radio buttons, separate each response with a comma.
6. Check **Required** checkbox to make the question mandatory.
7. **Number Of Columns**: For radio buttons, select the number of columns in which to display the responses.
8. Select **File Type**: Choose No file, Resource (from all uploaded resources), or File (for document upload).
9. Select **Category**, specifying where to display the question (Eligibility, Opt-in, etc.).
10. Select which **Indication(s)** the question applies to or apply to all indications.
11. To make the question private, so it is not displayed after answered, check the box **Hide Question Once Answered**, and to prevent the response being editable (by Administrators / Customer Service) after answering, check the box **Lock Question Once Answered**.
12. Select **Status** to **Active**.
13. Click **Submit**.

Notes:

- Click on the **Order Question Layout** button to adjust the order of questions.
- The **Live Question Editor** previews how a question will appear to users. It shows the layout but doesn't display actual responses or linked files that will be visible once live. URL links are clickable in the preview.

Compliance Considerations for Amending Questions:

- Making a Question Inactive: When a question is deactivated, it will still appear on previously submitted patient requests that were completed prior to the change.
- Editing the 'Text' Field: Modifying the text of a question will result in the updated wording being reflected on both new and previously submitted patient requests. The impact of these changes on physicians who have already entered data for prior requests should be

considered; it may be preferable to deactivate the question and create a new one instead.

- Modifying Dropdown Options: If a dropdown question is edited and a possible response is removed, that removed option will remain visible on patient requests that have already been submitted with that response.
- Changing Uploaded Documents: Replacing a document (such as Terms) on an existing active question will apply the updated document to all instances of the question, including previously completed patient requests. If the new document should only be applied to new patient requests, deactivate the existing question and create a new one with the updated document. (This also applies to updating url links.)

8.2.7 Setting Up Central Pharmacy Distribution

For programs with **Centralised Pharmacy Management** selected, only pre-nominated pharmacies will be available to physicians in the **Nominate A Pharmacy** dropdown when creating a patient request.

To set up A Centralised Pharmacy:

1. In the **PHARMACIES** menu, ensure that the required pharmacy(ies) are marked as central by checking the **Enable Selection As Central Pharmacy** box in the pharmacy profile.
2. Add central pharmacy to program:
    - In the program's menu, go to **Centralised Pharmacy Management** and click **Add New**.
    - Select the pharmacy from the list of available central pharmacies.
    - Click **Submit**
3. Repeat Steps 1-2 to add additional pharmacies.

To remove a Central Pharmacy from a program:

1. Go to the **PROGRAMS** menu, locate the program and click **View**.
2. In the **Centralised Pharmacy Management** table, uncheck the pharmacy's **Status** checkbox. This will remove the pharmacy from being displayed on new patient requests.
3. Important Notes:
    - This does not remove the pharmacy from already Active patient requests who have nominated the pharmacy.
    - Ensure the program has at least one pharmacy nominated as a Central Pharmacy.

To completely remove a pharmacy from Centralised Pharmacy Management:

1. Go to the **PHARMACIES** menu, locate the relevant pharmacy and click **View**.
2. Click **Edit**.
3. Uncheck **Is a Central Pharmacy**. This will remove it from being selectable as a Central Pharmacy when setting up a program.
4. Click **Submit.**

8.2.8 Setting Clinical Benefit Assessments

- The Clinical Benefit feature ensures that physicians confirm the patient is benefiting from the product before proceeding with orders.
- How it works:
  1. Set it Up:
     - Create for one or multiple products
     - Create for one or multiple indications
     - Trigger it once or multiple times during the program
     - Set a price or order number threshold and the feature triggers when exceeded.
  2. Once triggered:
     - Patient order is locked
     - Physician receives notification to complete the assessment, and the nominated pharmacy is also notified
     - An assessment pop-up on the patient request is displayed. (Administrators can complete the assessment on behalf of the physician)
     - Assessment completion of 'yes' required to unlock the next order (no assessment, or a response of 'no' will keep the order locked)
  3. The response is recorded on the Patient Request and Administrators receive an email notification.

To set up a Clinical Benefit Assessment:

1. In the program, scroll to **Clinical Benefit** and click **Add New**.
2. Enter a **Name** for the clinical benefit (for Admin use only).
3. Select the **Threshold Type**.
4. Enter the **Threshold Value/Price** (the assessment triggers AFTER this value is reached).
5. Select the **Product** this applies to.
6. Select the **Indication** this applies to.
7. Set the **Status** to **Active.**
8. Repeat steps if multiple clinical benefits are required.

9 PHYSICIAN AND PHARMACY MANAGEMENT

9.1 Physician Account Management

9.1.1 Physician Registration Process

- Physicians register for an account through the homepage.
- Email validation prevents duplicate accounts.
- After registration, Administrators must approve the account before it is activated.
- Upon approval, physicians receive an email with password setup instructions.

9.1.2 Administrator Actions For Physician Accounts

9.1.2.1 Approving/Rejecting New Registrations

To approve or reject a registration request:
1. Click the link in the email notification or go to **PHYSICIANS** → **Waiting Approval** tab.
2. Select either **Approve User** or **Reject User**.
3. The physician will receive an email confirming their registration status. If approved, they will also receive a link to set their password.

9.1.2.2 Managing Physician Profiles

Administrators and Customer Service can view and amend physician details:
1. Go to the **PHYSICIANS** menu.
2. Search for the physician and click **View**.
3. Click **Edit** to update details, then click **Submit** to save changes.

9.1.2.3 Physician Password Management

- Physicians can request a password reset from the homepage.
- Administrators and Customer Service can send a reset link:
    1. Access physician's profile in the **PHYSICIANS** menu
    2. Click **Send Forgotten Password Email**. The reset link is valid for one hour.

9.2 Institution Management

- An Institution is a physician's practice location.
- Physicians can link multiple Institutions to their profile.
- During patient enrollment, physicians choose the institution where the patient is being treated.

To set up an Institution:
- Physicians:
    1. During registration: Select an existing institution or enter a new one (in their country only). New institutions become available to all physicians for future registrations.
    2. Post-registration: Add new institutions via their **Profile**.

- Administrators, Approvers and Customer Service:
  1. Go to **INSTITUTIONS** and click **Create**.
  2. Complete Institution details
  3. Click **Submit** to save.

Modifying Institutions:
1. Go to the **INSTITUTIONS** menu.
2. Locate the institution and click **View**.
3. Click **Edit** to update the institution's details and click **Submit** to save the changes.
4. To deactivate: Change the **Status** to **Inactive** and click **Submit** to save. This will make the institution no longer visible.

9.3 Pharmacy Account Management

9.3.1 Account Creation

Key Features:
- Pharmacies are granted accounts for product ordering for patients.
- Pharmacy accounts can be created by Physicians, Administrators and Customer Service.
- Each pharmacy has a primary user.
- Optional team members (up to two by default) can be added.
- Duplicate prevention system checks name, street, and suburb. If two fields match, a duplication error message will be displayed. The primary pharmacy user's email must also be unique.

To create a new Pharmacy:
- For Physicians:
  1. When creating a patient request, select **Check to enter details for a New Pharmacy**.
  2. Complete pharmacy's details. The primary pharmacy user will be sent an email to set up their account.

- For Administrators and Customer Service:
  1. Go to the **PHARMACIES** menu and select **Create**.
  2. Enter the Pharmacy **Name**.
  3. Select **Status** as **Active** (it is selectable).
  4. Enter the **User Details**.
  5. Enter the Pharmacy's Primary **Address**.
  6. To use the same address for deliveries, check the box **Check for the delivery details to be the same as above details** or enter a different address under **Primary Pharmacy Delivery Details**.
  7. Add an optional additional delivery address via **Alternate Pharmacy Delivery Details**.
  8. Click **Submit** to save. The primary pharmacy user will be sent an account setup email.

9.3.2 Team Member Management

Primary User Capabilities:

- Can add team members.
- Manage team member access, with two active at any one time.
- Update pharmacy details (with the exception of Country which cannot be changed).

Team Member Permissions:

- Submit orders.
- View patient requests.
- Access resources.
- Cannot modify pharmacy details.

To add Team Members:

1. Go to the **PROFILE** menu.
2. Scroll to **Pharmacy Team Members** and click **Add New**.
3. Fill in the user details and click **Submit**. The user will receive a password setup email.

Note: Administrators and Customer Service cannot add team members but can assist in user management once created by the Pharmacy.

To Deactivate Team Members:

- To make a team member inactive, the Primary Pharmacy User can go to **PROFILE**, locate the team member and uncheck their **Status** box. This will also allow them to add a new team member.

Adding Additional Team Members:

- Administrators and Customer Service can override the two active team member limit:
  1. Go to the **PHARMACIES** menu and click **View** on the relevant pharmacy
  2. Locate the team member to make active and click **View**, then **Edit**.
  3. Change the **Status** to **Active** and click **Submit**.

9.3.3 Address Management

- Addresses are added by the pharmacy primary user via their **PROFILE.** Once created, Administrators and Customer Service can support in modifying address details.
- Types of Addresses:
  - Primary Address: Visible to physicians when nominating a pharmacy on a new patient request.
  - Primary Delivery Address: Can match primary address and is used for standard deliveries
  - Alternate Delivery Address (e.g., for compounding): Includes separate contact email for delivery notifications.
- Once established, pharmacies can select either primary or alternate delivery address when submitting orders.

9.3.4 Pharmacy Password Management

- Pharmacy Users can request a password reset from the homepage.
- Administrators and Customer Service can send a reset link:
  1. Locate pharmacy in the **PHARMACIES** menu and click **View**.
  2. Access the pharmacy user's profile in **Users** table and click **View**.
  3. Click **Send Forgotten Password Email**. The reset link is valid for one hour.

9.3.5 Deactivating Pharmacies

- Deactivating a pharmacy will remove it from physicians' view, prevent its users from logging in, and stop it from managing orders.
- The pharmacy will remain accessible to Administrators and Customer Service for future reference.
- To deactivate a pharmacy:
  1. Go to the **PHARMACIES** menu and locate the pharmacy.
  2. Click **View** and ensure there are no active patients associated with the pharmacy.
  3. Click **Edit** to update the pharmacy's status.
  4. In the **Status** field, select **Inactive** and click **Submit**.

10 RESOURCES

10.1 Overview

- Resources can be accessed via the top menu and are visible to all user types.
- Resources can be restricted by country, allowing control access.
- Administrators manage resources, including adding, editing, or removing them.
- Resources can be either links (URLs) or uploaded files.
- Resources are organised in an accordion format, grouped under specific Group Names (e.g., by program, by specialty area), providing easy navigation and organisation of resources for users.

10.2 Adding New Resources

1. Go to the **RESOURCES** menu and click **Create**.
2. Enter the **Name** of the resource as it should appear to users.
3. Select **Type**: Choose Link (for a URL) or File (to upload a document).
4. Specify the **Group Heading** where the resource will appear. You can either create a new Group, or add it to an existing Group by entering its name. The resource will be displayed in a collapsed accordion underneath the Group Heading.
5. Select the **Countries** where the resource should be visible. The resource will only be displayed to physicians and pharmacy users registered to the same country. Internal users can see all resources.
6. Set **Status** to **Active** (visible to users) or **Inactive** (hidden from users).
7. Click **Submit** to save the resource.

10.3 Editing Resources

1. Go to the **RESOURCES** menu and search for the resource.
2. Click View, then click **Edit** to update:
    - **Name** of resource
    - **Group Heading**
    - **Type** (file or URL)
    - **Storage Document/URL Link**
    - **Country**
3. Once complete, click **Submit**.

10.4 Deactivating Resources

1. Go to the **RESOURCES** menu
2. In the table, collect the resource and uncheck the **Status** checkbox.
3. The resource is deactivated and no longer visible to users.

11 MANAGING ACTIVE PROGRAMS

11.1 Managing Patient Requests

11.1.1 Roles and Access

Each enrolled patient is assigned a unique patient ID number, generated sequentially based on the date and time of their submission.

Patient requests can be accessed through the **PATIENT REQUESTS** menu. Access is role-based:

- Physicians and pharmacies: View only their linked requests.
- Administrators, Customer Service, Approvers, and Observers: View all requests.

11.1.2 Patient Request Status Types

Patient request can have the following statuses:

- Pending Approval: Submitted and awaiting action.
- Active: Approved and in progress.
- Closed: Program and all associated requests are closed.
- Complete: Request is fully processed with all orders completed.
- Cancelled: Request is withdrawn with no further actions possible.
- Rejected: Request is denied.

11.1.3 Creating Patient Requests

Physicians can submit requests for active programs matching their specialty:

1. Go to the **PATIENT REQUESTS** menu and click **Create Request**.
2. Ensure details are correct and select your practice (if multiple are registered).
3. Complete required program information:
   - Select **Program** from the dropdown
   - Select **Indication** from the dropdown
   - Select **Product** from the dropdown (auto-selected for fixed programs)
   - Select **Dosing Regimen** from the dropdown (pre-selected for fixed programs)
   - If Variable Quantity is enabled, select **Amount**
4. Enter patient information:
   - Initials
   - Gender
   - Date of birth
   - Expected treatment date
5. Complete **Eligibility Criteria** (if required).
6. **Nominate a Pharmacy** from the existing list or add a new pharmacy.
7. Answer physician **opt-in** questions.
8. Click **Submit**.

11.1.4 Approving Patient Requests

For programs that require patient request approval, Approvers (and Administrators) can follow these steps to review and approve or reject pending requests:

1. After submission of a patient request, Approvers receive an email notification.
2. Click the link in the email to log in and view the pending patient request.
3. Choose **Approve Request** or **Reject Request**. (Note: Requests cannot be amended whilst pending approval.)
4. In the pop-up, enter a reason and click **Approve**. This will be recorded on the patient's **Administration Tracker**.
5. The physician receives an email confirming the decision. If approved, the nominated pharmacy is also notified via email.
6. Note: All pending requests can also be accessed via **PATIENT REQUESTS** → **Pending Approval** tab.

11.1.5 Amending Patient Requests

Administrators and Customer Service can amend select information on an **Active** request:

- Patient initials
- Date of birth
- Gender
- Eligibility criteria questions
- Uploaded documents
- The nominated pharmacy
- Note: The treating physician and program details cannot be changed.

To amend a patient request:

1. Go to **PATIENT REQUESTS** and search for the patient.
2. Click **View** and edit the necessary fields.
3. Click **Update Details** (button activates once changes are made).
4. In the pop-up window, select the reason for the update and click **Update Details**.
5. Changes are logged in the **Administration Tracker Activity Log**, visible only to Administrators. The log records the reason, the user who made the change, and the date.

11.1.6 Changing Patient's Pharmacy

Administrators and Customer Service can update a patient's pharmacy to manage future orders:

1. Go to the **PATIENT REQUESTS** menu and locate the patient.
2. Click **View**, then in **Select New Pharmacy**, choose a new pharmacy (or add new pharmacy).
3. Once complete, click **Update Details**.
4. Enter a reason in the pop-up (this is recorded on the patient request **Activity Log**) and click **Update Details**.

11.1.7 Cancelling Patient Requests

Cancellations can be actioned by physicians or Administrators:

1. Go to **PATIENT REQUESTS** and search for the patient.
2. Click **View** and at the bottom of the request click **CANCEL PATIENT**.
3. Confirm by clicking **Ok**.
4. The Patient Request **Status** updates to **Cancelled**.

Important Note: Cancelling permanently removes the patient and pending orders from the program. This action cannot be undone.

11.1.8 Adding Patient Notes

Administrators can add notes to active patient requests to document important information:

1. Go to **PATIENT REQUESTS** and search for the patient.
2. Click **View** and enter text in the **Patient Notes** field.
3. Click **Update Details** and enter a reason for the update (recorded in the **Activity Log**). These notes are not visible to other users.

11.2 Order Management

11.2.1 Roles and Access

When patient requests are approved, the first order is automatically generated with a unique order ID. Subsequent orders are created each time an order is marked as 'Sent'.

Orders are viewed in the **ORDERS** menu. Access is role-based, ensuring appropriate visibility for each user type:

- Physicians and pharmacies: View orders linked to their patients.
- Administrators, Customer Service, Approvers, and Observers: View all orders.

11.2.2 Order Status Types

Order have one of six statuses:

- Waiting For Pharmacy: In the pharmacy's queue to be placed.
- Waiting For Customer Service: Order has been generated by pharmacy, and awaiting processing by Customer Service.
- Awaiting Shipment: For sFTP integrated programs, the order has been submitted by Customer Service and sent to the 3PL.
- Sent: Confirmed by Customer Service.
- Cancelled: Patient request has been cancelled along with associated orders.

11.2.3 Submitting Pharmacy Orders

Users at the nominated pharmacy can place orders (as can Administrators and Customer Service), and orders can be submitted once the **Unlock Order Date** has been reached.

To place an order:
1. Go to **ORDERS** → **Waiting for Pharmacy** and search for the patient. Ensure it is unlocked for processing.
2. Click **View** to review the order details.
3. Complete required selections (e.g., dosing regimen, quantity, patient weight).
   - Note: First orders in multi-product programs may require additional products to be added if overlooked in initial request by physician. If added by the pharmacy, the addition will be flagged to Administrators and Customer Service when the order is submitted.
4. Select delivery location. If necessary, update the 3PL account number.
5. Click **Submit Order.** Order status changes to **Waiting For Customer Service** and Customer Service receives an order email notification.

11.2.4 Amending Submitted Orders

Orders can be amended by Administrators and Customer Service after being submitted by the pharmacy, when their status is **Waiting For Customer Service**. Once an order is confirmed (status is **Sent**) no further changes can be made.

The following order details can be amended:
- Dosing Regimen
- Patient Weight
- Quantity of SKU(s) (to any quantity)
- Quantity of a variable quantity product (to any quantity)
- Unit Price. This can include negative amounts for price reversals. Free orders cannot be amended.

To amend an order:
1. Go to the Product section on the order
2. Adjust the product details as required and any associated calculations (eg number of vials) will dynamically update.
3. Click **Save Changes to Order** and enter a reason for changes. Changes are recorded on the order and on the order form.

Note: on the first order of a multi-product program, if the physician and pharmacy have inadvertently not included a required product that is part of the program, Administrators and Customer Service can add this product.

11.2.5 Confirming and Sending Orders

Once an order is 'confirmed', the status changes to 'Sent'. The next order is automatically generated based on the 'Frequency of Supply' set for the product's dosing regimen.

To confirm an order:

1. Click on the link in email or go to **ORDERS → Waiting For Customer Service** and locate the order.
2. Click **View** to review and update product details and delivery info as needed.
3. Include any dispatch notes, comments, PO number, order reference number etc.
4. If changes are made, click **Save Changes to Order** and enter reason (recorded in the order override history).
5. **Download order form** to send to 3PL (optional step and can occur after Step 6).
6. Click **Confirm Order** to update the order status to **Sent**. This will automatically generate the next order (per the program rules).

11.2.6 Unlocking Orders For Early Pharmacy Placement

Administrators and Customer Service can unlock orders before their Due Date:

1. Go to **ORDERS**, locate the patient order and click **View**.
2. Check the **UNLOCK ORDER** box.
3. Adjust the **Due Date** within suitable range and click **Apply**.
4. Click **Submit**, enter a reason, and click **Submit** again. If the new date adheres to the program rules, the order will be unlocked for processing.

11.3 Managing Clinical Benefit Assessments

- Administrators can complete a clinical benefit assessment by accessing the patient request once the assessment is triggered.
- Administrators can modify physician responses (if required):
  1. Go to **PATIENT REQUESTS** and find the relevant patient request.
  2. Click **View** and scroll to the **Clinical Benefit** table.
  3. Click **View**, then click **Edit**.
  4. Check or uncheck the box for **Deriving Clinical Benefit** as needed.
  5. Update the **Response Type** (standard response types are: Complete response, Stable response, Partial response, Not applicable).
  6. Click **Save**.

12 CLOSING A PROGRAM

12.1 Overview of Program Closure Options

Administrators can close a program in two ways:

1. Close to new enrollments only: This option prevents new patients from enrolling while allowing existing patients to continue placing orders.
2. Complete program closure: This option closes the program entirely, preventing new enrollments and cancelling all existing orders.

12.2 Close A Program To New Enrollments Only

1. Go to the **PROGRAMS** menu and click **View** on the relevant program.
2. Either:
   - Change the program **Status** from **Live** to **Inactive**, or
   - Use the calendar function to reset the required end date (the program will automatically show as **Completed** once this date is reached).
3. To verify the change, click on **Create Patient Request** - the program should no longer appear as an option.

Important notes:

- Existing enrolled patients can continue placing orders
- Administrators retain access to inactive programs
- Programs can be reactivated if needed

12.3 Complete Program Closure

1. Go to the **PROGRAMS** menu and select **View** on the relevant program.
2. Ensure the program **Status** is **Inactive** or **Closed**.
3. Click the **Close Program** button to close the program.

Warning: This action:

- Automatically changes all patient requests to **Closed** status
- Cancels all associated orders
- Is permanent and cannot be undone

Please ensure you intend to fully close the program before proceeding, as these changes cannot be reversed.

13 NOTIFICATIONS & USER FEEDBACK

The notification system allows Administrators to deliver targeted updates, alerts, and collect user feedback through customisable pop-up messages.

13.1 Notification Types

- Message: A straightforward text-based notification with title and message.
- Link: Includes a single, clickable URL.
- Double Link: Includes two clickable URLs.
- Feedback: Includes interactive star rating and allows collection of user feedback. Responses are viewable in the Feedback Report.

13.2 User Targeting Matrix

User Role	Login	Order Viewed	Order Submitted	Patient Request	Request Submitted
Administrator	✓	✓	-	✓	✓
Approver	✓	-	-	-	-
Observer	✓	-	-	-	-
Customer Service	✓	✓	-	-	-
Physician	✓	✓	-	✓	✓
Pharmacy Primary	✓	✓	✓	-	-
Pharmacy Team Member	✓	✓	✓	-	-

13.3 Creating A Notification

To add a new notification:

1. Go to **NOTIFICATIONS** and click **Create**.
2. Enter the notification **Name** (internal use only, for Feedback notifications, this displays in the **Feedback Report**).
3. Select **Notification Type.**
4. Select the **Countries** where the notification will be shown.
5. Set **Start Date** and **End Date** to specify when the notification will be active. These are based on AEST time:
    - The notification will activate at 12:00 AM on the Start Date.
    - The notification will end at 11:59 PM on the End Date.

6. Select **Notification Targets:** Choose where the notification appears
   - **User Login**: First screen after login
   - **Orders Viewed**: When viewing an order for the selected programs/specialities
   - **Order Submitted**: After order submission confirmation
   - **Patient Request "Select Program"**: When selecting specific programs from the 'Program' dropdown when creating a patient request
   - **Patient Request Submitted**: After submission of a new Patient Request
7. Select **User Type** to display notification to.
8. Select **Frequency:**
   - **Once only**: Single display per user
   - **Every time**: Displays at each target location visit
   - **Every login**: Once per portal session
   - **Daily**: Once per day
   - **Days** (7, 30, 90 180, 360): Based on individual user activity and cycles restart from user's first view. For example, "30 days" means the notification appears from the Start Date, then triggers every 30 days until the end date.
9. Add **Title, Message, Link Text, Link URL**.
10. Click **Submit**.

13.4 Managing Notifications

1. Go to **NOTIFICATIONS** and locate the notification.
2. Click **View** for details. Select **Preview Notification** for visual preview.
3. To make changes, click **Edit**, update the necessary fields, and click **Submit** to save.
4. To update active dates:
   - Click on the date field.
   - Choose the desired dates from the calendar or enter them manually.
   - Click **Apply** to update
5. To deactivate a notification:
   - Adjust the End Date to a past date, or
   - Click the **Live** Status button and set it

13.5 User Feedback

Administrators can access a Feedback Report to gain valuable insights from Feedback notifications.

1. Go to **REPORTS** and locate the **Feedback Report** in the list of available reports.
2. Click **Run Report** to view the results. A table will display a limited set of results by default.
3. To view all data, click **Export** to download the complete report in Excel format.

Best Practices

- Monitor feedback regularly
- Export data for detailed analysis
- Use insights to improve user experience

14 COMMON ISSUES AND TROUBLESHOOTING FAQs

14.1 Login Issues

14.1.1 Why can't a physician login?

- Verify the physician is registered with an active account by searching their name in the **PHYSICIANS** menu.
- If they are not registered, guide them to register via the site homepage.
- If they are registered and active, ensure they are using the correct email address associated with their profile.
- If the email is correct, direct them to reset their password via the portal homepage by selecting the **Forgot password?** link.
- Alternatively Administrators can trigger a password reset by clicking **Send Forgotten Password Email** in the physician's profile.

14.1.2 Why can't a pharmacy user login?

- Go to the **PHARMACIES** menu and search for the pharmacy's account.
- If located, ensure the pharmacy's **Status** is set to **Active**.
- Click **View** and verify that the user's email address associated with the account is correct and active.
- If everything is correct, direct the user to reset their password by clicking **Forgot password?** on the login page.
- Alternatively Administrators can trigger a password reset by clicking **Send Forgotten Password Email** in the pharmacy user's profile.
- If the email address is incorrect, update it in the user profile under **View** → **Edit**, then submit the changes.
- If the pharmacy user isn't registered, add them via the **PHARMACIES** menu.

14.1.3 Why isn't the 'Forgotten Password' email link working?

- The password reset link is valid for **one hour**. After this time, it expires, and the user must request a new password reset.
- Only the most recent password reset link will be valid. If multiple resets requests are triggered, only the latest link will work.

14.2 Account and Profile Issues

14.2.1 Why am I getting an error when trying to update my email address / profile?

- Each user must have a unique email address. If the email is already in use (including on an inactive or rejected account), an error message ("Object not updated") will appear.
- Administrators or Customer Service can update user email addresses linked to inactive or rejected accounts, thereby making that email address available to use on a new account.

14.2.2 Why am I getting a duplication error when adding a new pharmacy?

- The system checks for duplicate pharmacies by validating fields like Pharmacy Name, Street Address, and Suburb.
- If any of these match an existing pharmacy account, a new account cannot be created.
- Additionally, the email address for the Primary Pharmacy User must be unique and cannot be associated with another user, including inactive or rejected accounts.

14.3 Program and Patient Request Issues

14.3.1 Why can't a physician see a program when creating a patient request?

This is likely due to a mismatch between the physician's Specialty and the program's assigned Specialty. To resolve, either update the program's product to include the relevant speciality, or, update the physician's speciality in their profile under the **PHYSICIANS** menu.

14.3.2 Why is a physician seeing a '404 - Institution not found' error when creating a patient request?

- If a physician encounters a "404 - Institution not found" error while submitting a patient request, it means their profile does not have a linked place of practice.
- To resolve this, the physician should go to their **Profile** menu and add a new **Institution**.

14.3.3 Can approvers amend a 'Pending Approval' patient request?

- No, a 'Pending Approval' patient request cannot be edited by any user to maintain the integrity of the submitted information.
- If changes are needed, the approver must either reject the request (allowing the physician to submit a new one) or approve it, after which an Administrator can make changes. All changes are recorded in the Activity Log.

14.4 Order Issues

14.4.1 Why can't a pharmacy find a patient to place an order?

- Verify that the patient is enrolled and 'Active.'
- If the patient is active but still not visible to the pharmacy, check the nominated pharmacy in the patient request. If it doesn't match the inquiring pharmacy, an Administrator or Customer Service can update the nominated pharmacy:
  - Go to the patient request and select the new pharmacy under **Select New Pharmacy** and click **UPDATE DETAILS**.
  - Enter a reason for the update and click **UPDATE DETAILS** again.

14.4.2 A pharmacy has requested to submit an order, but it's locked. How do I unlock it?

- Orders can only be placed on defined dates based on the product's supply frequency (set by an Administrator in the Product menu).
- If an order needs to be placed before the Due Date or Unlock Order Date, an Administrator or Customer Service can unlock it:
  - Locate the patient order and click **View,** check the **UNLOCK ORDER** box and update the Due Date field with the new due date.

- Click **Submit** and enter a reason for the order update. This will unlock the order for processing, provided a valid date is entered.

14.4.3 How can a pharmacy send an order to a different address?

Pharmacies can add an **Alternative Delivery Address** in their **Profile**. Once added, this alternative address can be selected for any order placed by the pharmacy.

14.4.4 Can A 'Sent' order be amended?

No, once an order has been confirmed by an Administrator or Customer Service and the status is 'Sent', it cannot be amended.

14.4.5 How is the order Due Date calculated for products in a program?

The reorder frequency for a product is determined by the 'Frequency of Supply' set for the product's dosing regimen (found in the Product menu). After an order is marked as 'Sent', the system automatically calculates the due date for the next order. If an 'early order placement period' is set in the Program menu, the system will unlock the next order early, according to the number of days specified in the 'early order placement period' field.

14.5 User Roles and Permissions

14.5.1 Can a user have multiple roles?

No, each user can only be assigned one role at a time.

14.5.2 Can a physician manage the placement of orders?

Physicians can create and manage patient requests, but do not have access to place or manage orders.

14.6 Resource Issues

14.6.1 Why can't a physician or pharmacy see any Resources?

If a user is unable to see the resources, follow these steps to troubleshoot the issue:

1. Confirm the resource is created: Administrators, go to the Resources menu and make sure the resource is listed.
2. Ensure the resource is set to 'active': The resource must be active to be visible. If it's inactive, change the status to active.
3. Verify country settings: Make sure the resource is configured to display in the relevant countries for your users.

IMAGINE IF HEALTH

Email Address

jason@imagineifhealth.com
dana@imagineifhealth.com

Website

www.imagineifhealth.com