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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1. INTRODUCTION TO THE PLATFORM

1.1 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. It ensures patient medication requests are managed efficiently, securely, and transparently, reducing administrative burden while improving access to treatment.

Key Benefits:

- **Efficiency** – Fast submission, approval, and ordering of patient medication requests.
- **Flexibility** – Programs can be tailored to meet diverse business and clinical requirements.
- **Visibility** – Comprehensive dashboards and reporting provide real-time tracking of requests, orders, and program performance.
- **Security** – Role-based access control safeguards sensitive data and ensures compliance.
- **Communication** – Automated notifications and branded email alerts keep all stakeholders informed.

1.2 Core System Components

The platform is built around seven core components, each supporting the lifecycle of medicine access programs:

1. Patient Request Management – Physicians submit and track patient requests through automatic or approval workflows, with real-time status updates.
2. Physician Registration – Secure registration and verification of healthcare providers.
3. Pharmacy Management – Centralised or decentralised workflows for order fulfillment and delivery.
4. Program Management – Creation and configuration of programs, including product setup, dosing regimens, eligibility criteria, pricing models, product limits, and clinical benefit rules.
5. User Management & Roles – Role-based access for administrators and support staff, physicians, pharmacies, with activity logging to ensure accountability and compliance.
6. Reporting – On-demand reports and dashboards to monitor performance and compliance.
7. Notifications & Feedback – Automated pop-up alerts by user type, automated email updates, and customer feedback collection.

1.3 Platform Functionality

Together, these components enable administrators to:

- **Design and launch programs** with detailed product and dosing configurations.
- **Register and verify physicians** to ensure compliance.
- **Manage patient requests** from submission through approval and fulfillment.
- **Coordinate pharmacy operations** for accurate and timely order processing, per program rules.
- **Monitor performance** with real-time reporting and dashboards.
- **Communicate effectively** with physicians and pharmacies.

1.4 Key Features Overview

Category	Key Features	What It Enables
👥 **User & Account Management**	**Role-based access**: Defined permissions for internal users, physicians, and pharmacies. **Physician registration & authentication**: Secure credential verification before access. **Pharmacy role hierarchies**: Structured accounts for pharmacy users. **Profile management**: Update and maintain users centrally. **Activity logging**: Track user actions.	Secure, compliant access tailored to user type; streamlined onboarding; structured permissions.
🏥 **Program Creation**	**Country Configuration:** Run programs in a single country or across AU and NZ. **Specialty & indication mapping:** Link programs to multiple therapeutic areas and indications. **Product setup:** Configure one-to-many products per program. **Dosing regimens:** Define weight-based or flat-dose regimens; assign SKUs. **Automatic dose calculations:** Reduce manual errors for weight-based dosing. **Loading & titration schedules:** Order-level rules to support structured loading and titration regimens. **Ordering frequencies:** Set reordering cycle (e.g, QW, QM) for each regimen **Pricing models:** Free, alternating paid/free, threshold-based, or Buy/Get cycles. **Product limits:** Cap maximum orders per product/indication. **Clinical benefit triggers:** Automate benefit assessments based on thresholds.	Build customisable programs with precise dosing, pricing, and ordering rules.
⚙️ **Program Management**	**Program control**: Start, pause, amend, or close programs instantly or by schedule. **Approval workflows**: Assign approver(s) for new patient requests or set automatic approval. **Inventory oversight**: Manage SKUs, product codes, pricing, and dosing regimens. **Pharmacy workflows**: Central or decentralised ordering. **Flexible closures**: Close to new enrollments while maintaining existing patients, or fully terminate programs.	Full operational control and flexibility; efficient inventory and pharmacy management.
👩‍⚕️ **Patient Requests & Orders**	**Request submission**: Physicians create, edit, submit patient requests. **Tracking dashboards**: Monitor patient lifecycle status. **Order placement**: Pharmacies submit orders based on defined supply frequency. **Automated pricing calculators**: Enables accurate order pricing. **Customisable 3PL forms**: Tailored for logistics provider requirements. **Amendments & cancellations**: Flexible order management (under required conditions).	Simplify patient onboarding; streamline order processing; ensure accuracy and flexibility.

⚖️ **Eligibility & Compliance**	**Physician opt-ins**: Custom registration questions. **Patient eligibility criteria**: Define program-specific rules. **Document uploads**: Support compliance forms (e.g., SAS forms). **Adverse event requirements**: Display mandatory reporting obligations. **Age restrictions**: Enforce minimum age. **User & activity logging**: Full traceability of actions.	Enforce compliance standards; safeguard patient safety; maintain audit-ready logs.
🎨 **Branding & Communication**	**Custom branding**: Logos, colors, and program identity. **Branded email templates**: Automated alerts for updates, requests, and orders. **Resource display**: Provide physicians and pharmacies with program materials. **Pop-up notifications**: Schedule alerts by user type.	Strengthen brand identity; deliver consistent and automated communication; provide resources and timely alerts.
📊 **Reporting & Feedback**	**Report Factory**: Generate on-demand reports. **Program & product codes**: Maintain codes for internal reporting. **Feedback module**: Collect structured feedback by user type.	Generate insights; support internal reporting; collect structured feedback for improvement.

1.5 User Roles and Permissions

1.5.1 Segregation of Duties

The platform assigns different responsibilities to different user roles to keep clinical, operational, and administrative tasks separated. This segregation of responsibilities is enforced through role-based access controls, configurable workflows, and multi-user approval pathways.

Key separations include:

- Physicians initiate patient requests but cannot approve or fulfil them.
- Nominated Program Approvers approve or reject patient requests for their assigned programs but cannot place or fulfil orders.
- Nominated pharmacies fulfill orders for assigned patients but cannot approve patient requests.
- Customer Service can support and action operational tasks (e.g., updating requests, processing orders) but cannot approve clinical decisions.
- Administrators have full administrative capability; however, all actions are logged, timestamped, and fully auditable.
- Observers maintain oversight only, with no ability to edit or action workflow items

1.5.2 Overview of Roles

User Type	Primary Purpose	Key Permissions/Actions
Administrator	Owns platform configuration and governance	• Full access to all features and data • Configure site branding (colours, image, into text, footers) • Manage users and roles (add, edit, deactivate) • Set up specialities, indications, products, programs • Manage physician registration & accounts

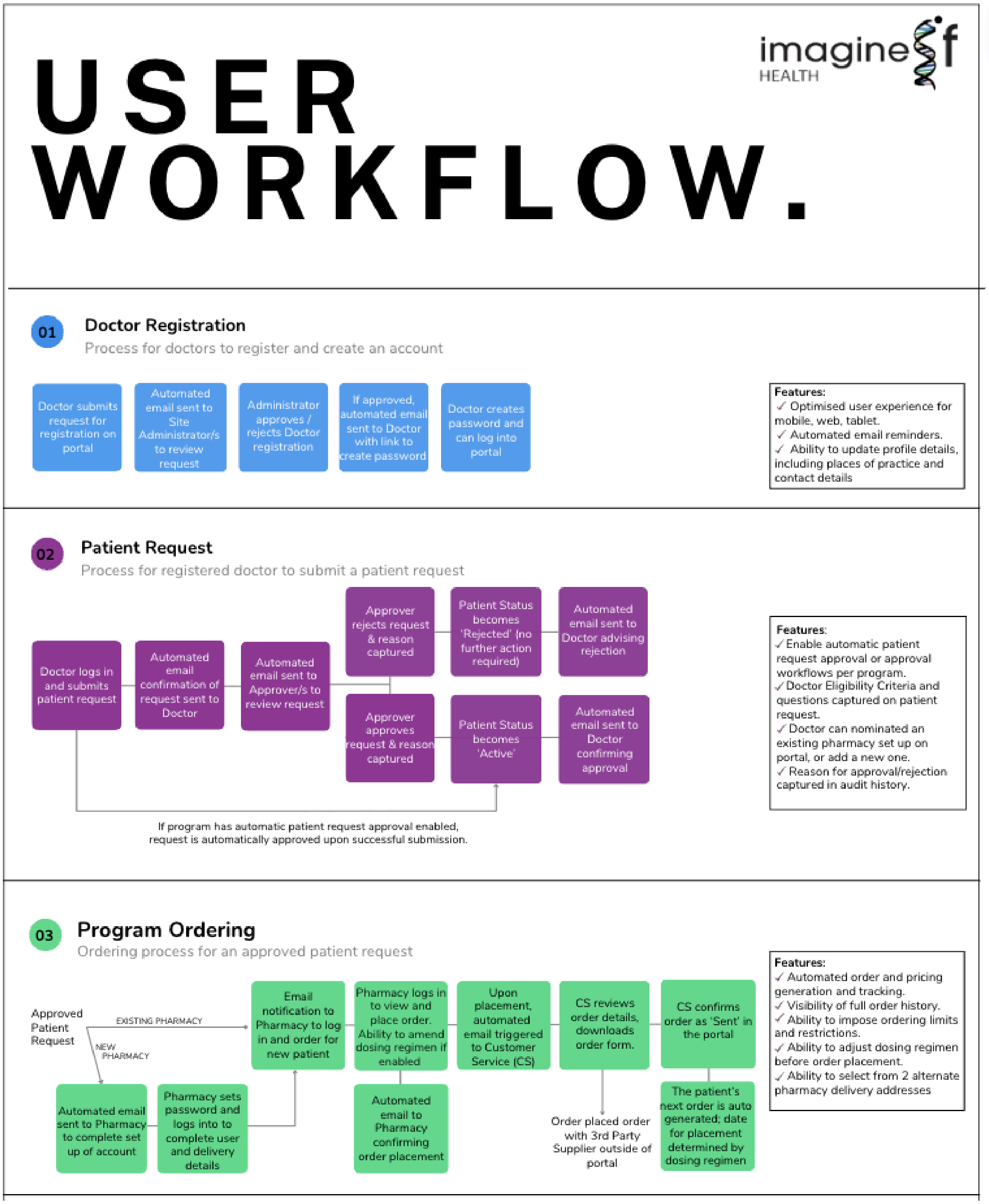
		• Manage physician Practice Locations • Manage pharmacy accounts • View, approve/reject/return, update & cancel patient requests • Manage 'Special Conditions' on active patient requests • Transfer patient requests between physicians and pharmacies • View, unlock, amend, confirm, and cancel submitted orders • Manage 3PL order form templates • View, submit & update patient clinical benefit assessments • Run, schedule and export reports • Upload and organise resources
Customer Service	Day-to-day request & order support	• Manage physician registration & accounts (incl Institutions) • Manage pharmacy accounts • View and update patient requests • Transfer patient requests to new physicians and pharmacies • View, unlock, amend, confirm, and cancel submitted orders • Manage 3PL order form templates • View resources
Approver	Gatekeeper for assigned patient requests, support physician management	• Approve/reject/return patient requests for assigned programs • Manage patient 'Special Conditions' for assigned programs • View all patient requests and orders • Approve/reject & view physician accounts • Create and update Institutions • Manage pharmacy accounts • View resources
Observer	Oversight and monitoring	• View all patient requests and orders • View resources • No editing rights
Physician	Initiates and monitors patient access	• Create, save, submit and withdraw patient requests (for programs linked to their specialty) • Track orders for their assigned patients • Complete clinical benefit assessments • Manage profile, including their linked Practice Locations • View resources
Pharmacy (Primary)	Leads pharmacy fulfilment	• View, submit, track orders for assigned patients • View patient requests for assigned patients • Edit pharmacy details • Add & remove pharmacy team members • View resources
Pharmacy (Team Member)	Assists primary pharmacy user	• View, submit, track orders for assigned patients • View patient requests for assigned patients • View pharmacy details (no editing rights) • View resources

1.5.3 Detailed Permissions Matrix

Function	Admin	Customer Service	Approver	Observer	Physician	Pharmacy (Primary)	Pharmacy (Team)
Patient Request Management (PRs)							
Submit PR	✓	✓	X	X	✓	X	X
Approve/Reject/Return PR	✓ (All)	X	✓ (Assigned programs)	X	X	X	X
View PR - General Details	✓	✓	✓	✓	✓ (Own)	✓ (Assigned)	✓ (Assigned)
View PR - Administration Tracker	✓	X	✓ (Assigned programs)	X	X	X	X
Manage Special Conditions	✓ (All)	X	✓ (Assigned programs)	X	X	X	X
Update PR - patient details, Care Team, eligibility criteria, documents	✓	✓	X	X	X	X	X
Cancel PR	✓	X	X	X	✓ (Own)	X	X
Patient Clinical Review							
Action Clinical Benefit Assessment	✓	X	X	X	✓ (Own)	X	X
View Completed Clinical Benefit	✓	✓	✓	✓	✓	✓	✓
Order Management							
View Orders	✓	✓	✓	✓	✓ (Own)	✓ (Assigned)	✓ (Assigned)
Unlock *Waiting For Pharmacy* Order for processing	✓	✓	X	X	X	X	X
Submit *Waiting For Pharmacy* Order (including select updates)	✓	X	X	X	X	✓ (Assigned)	✓ (Assigned)
Amend *Waiting For C.Service* Order	✓	✓	X	X	X	X	X
Cancel *Waiting For C.Service* Order	✓	✓	X	X	X	✓	✓
Cancel Last *Sent* Order	✓	✓	X	X	X	X	X
Amend Last *Sent* Order	✓	✓	X	X	X	X	X
View & download 3PL Order Form	✓	✓	X	X	X	X	X
Add comments to Order Adjustment Log	✓	✓	X	X	X	✓ (For cancel only)	✓ (For cancel only)
View Order Adjustment Log	✓	✓	✓	✓	✓	✓	✓
Physician & Institution Management							
Create Physician Account	✓	✓	X	X	✓	X	X
Approve or Reject Account	✓ (incl email alert)	✓	✓	X	X	X	X
View Account	✓	✓	✓	X	✓ (Own)	X	X
Edit Details	✓	✓	X	X	✓ (Own)	X	X
Add/delete physician Institutions	✓	✓	X	X	✓ (Own)	X	X
Create Institutions	✓	✓	✓	X	✓	X	X
View & Edit Institutions	✓	✓	✓	X	X	X	X
Pharmacy Account Management							
Create Pharmacy	✓	✓	✓	X	✓	X	X
View Account Details	✓	✓	✓	X	X	✓(Own)	X (Own)
Edit Details	✓	✓	✓	X	X	✓(excl.	X

						Country)	
Add Team Members	X	X	X	X	X	✓	X
Remove Team Members	✓	X	✓	X	X	✓	X
Override Team Member limit	✓	X	✓	X	X	X	X
Platform & Resource Management							
Manage Internal Users	✓	X	X	X	X	X	X
View & Export Reports	✓	X	X	X	X	X	X
Receive Scheduled Emailed Reports	✓	✓	✓	✓	✓	✓	✓
Manage Portal Settings	✓	X	X	X	X	X	X
Upload Resources	✓	X	X	X	X	X	X
View Resources	✓	✓	✓	✓	✓	✓	✓
Program and Products							
Create & Manage Specialties	✓	X	X	X	X	X	X
Create & Manage Programs	✓	X	X	X	X	X	X
Create & Manage Products, Dosing Regimens and SKUs	✓	X	X	X	X	X	X
Create & Manage Indications	✓	X	X	X	X	X	X
Create & Manage 3PL Order Forms	✓	✓	X	X	X	X	X
Notifications							
Create & Manage Notifications	✓	X	X	X	X	X	X
Notification Recipients	✓	✓	✓	✓	✓	✓	✓

1.6 Typical User Workflow



1.7 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 user profile details.
- **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 and feedback 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

Use top-right search on each page to find:

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

1.8 Timezone Configuration

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

1. User Action Recordings and Local Time: All recorded user actions, such as those displayed in the Administration Tracker and Order Adjustment Log, 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 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 ACCESS & INTERNAL USER

This section explains how Administrators and users access the platform, including environment differences, initial setup, login, password recovery, and internal user management.

2.1 Understanding Staging v.s Production Environments

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

Environment	Purpose	Key Characteristics
Staging	Secure testing environment that mirrors the production site	Used to test new features and programs before release. Can test real-world scenarios without affecting live operations. Access restricted to authorised client users only.
Production	Live, public-facing site	Contains only fully tested and verified features. Used for all regular business operations.

2.2 Initial Administrator Setup

Your organisation's first Administrator account will be created by IIH. You'll receive an automated email with password setup instructions.

Once activated, this Administrator can:
- Login to both Staging and Production
- Create and manage internal user accounts
- Assign roles and maintain internal access governance

2.3 Logging In

To access the platform:
1. Go to the site's homepage and click **Login.**
2. Enter user email address and password.
3. Click **Sign In.**

⚠️If either credentials are incorrect, the system will display: "Invalid username or password".
⚠️ Staging Environment Note: During server updates, the Staging site may display a black login screen. A generic password is required in this scenario. If you are unsure of the password, contact IIH.

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 (link expires after 1 hour).

Password recovery is available to all user types.

2.5 Internal User Management and Role Assignment

Internal users include Administrators, Customer Service, Approvers, and Observers. (See ***Section 1.5*** for user roles and permissions.) Administrators are responsible for creating and managing these accounts.

2.5.1 Adding Internal Users

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

2.5.2 Managing User Accounts

To edit user details:

1. Go to **USERS**, find the **User Type** and locate the user.
2. Click **View** → **Edit** to update their details.
3. Click **Submit** to save.

To deactivate a user:

1. Go to **USERS**, find the **User Type** and locate the user.
2. Uncheck their **Status** box in the user list.

⚠️Data Handling: Internal User Accounts
Internal user accounts cannot be deleted from the system. This ensures full traceability of all actions performed within the platform, including approvals, amendments, status changes, and other audit-relevant activity.

2.6 Updating User Profiles

All users can update their own details via their **PROFILE** (details vary based on user type).

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

3 PLATFORM CONFIGURATION

Administrators configure site-wide settings via the Gear Icon (top-right) → **SETTINGS**. This is where all site identity, branding, and footer elements are managed.

3.1 Site Identity and Branding

3.1.1 Site Identity

Configure how your site appears to users:

- **Site Name** - used as the site title tag, homepage heading, email notification subject lines.
- **Site Welcome** - separate messages for non-logged users and logged in users.
- **Site Disclaimer** and **Site Approval Number(s)** - displays in the footer.

3.1.2 Branding and Visual Elements

Customise the look and feel of your portal to align with your organisation's branding:

- **Theme Colours**:
  - Primary - main brand colour.
  - Secondary - accent colour for select buttons.
  - Header Bar background colour.
  - Header Image background colour - behind the logo.
- **Logos**: appears in portal header and email notifications.
- **Homepage Image:** displays on homepage.

3.2 Site Footers

Rich text formatting is supported. URLs are allowed; file uploads are not.

- **Privacy**: Legal privacy information.
- **Terms**: Usage terms and conditions.
- **Contact**: Contact form and information (requires email set up for form submissions by IIH).
- **Adverse Events**: Only visible to logged-in users.

3.3 Physician Registration & Access Set Up

Administrators can configure what information physicians must provide during site registration. This includes adding global questions (shown to all physicians) or country-specific questions (shown only to physicians registering in that country). These questions can be used to collect additional details or capture required agreements

🛠️ To Set Up Registration Questions:

1. Go to **Site Questions** → **View** and choose either:
   - **Doctor Registration Opt-in Terms** (global questions), or
   - A country-specific group (e.g., Australia or New Zealand).
2. Click **Add New** to create a new question.
3. Enter a unique question **Name** (not visible to users).
4. Select question **Type**.
5. Enter the question **Text**
   - 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.

- For dropdown/radio questions, separate **Responses** with commas.

6. Set **File Type** to **No File** (public facing pages cannot accept documents for security).
7. Configure Question Behavior
   - **Required:** make the question mandatory.
   - **Hide Question Once Answered:** remove it from view once completed.
   - **Lock Question Once Answered:** to prevent future edits to responses.
8. Set **Status:** Choose Active (visible) or Inactive (not visible).
9. Click **Submit** to save.
10. Use **Question Layout** to adjust display order.

🛠️To edit or remove a question:

1. To edit: Click **Edit** next to the question in the table, make changes → **Submit**.
2. To remove a question from future registrations: uncheck the question's **Status** box (sets it to Inactive)..

⚖️Compliance Considerations:

- Inactive questions remain on historical registrations. They stop appearing for new registrations but stay visible on any submission made before deactivation.
- Editing a question updates it everywhere. Any change to the text or options immediately overwrites what appears on *all* past and future registrations. Because this affects historical records, it is often safer to deactivate the existing question and create a new one instead of editing.

3.4 Email Notification System

Email notifications are automatically generated from a noreply address and triggered by system events:

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 Requires Update: Notification that their patient request is not yet approved and requires changes.
7. Patient Request Rejected: Notification that their patient request has been denied.
8. Clinical Benefit Required: Notification indicating that patient clinical benefit assessment is needed.
9. Patient Request Transferred: Notification that a patient request has been transferred to their care.
10. Patient Request Withdrawn: Notification that their patient request has been cancelled in the portal.

Pharmacy Notifications

11. Pharmacy Set Password: Instructions for new pharmacies to set their password and confirm their details.
12. Team Member Set Password: Notification to new pharmacy team members to set their password.

13. New Patient Enrolled: Notification that a patient has been enrolled and the pharmacy has been nominated for ordering.
14. 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).
15. Order Confirmation: Confirmation of order placement.
16. 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.
17. 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

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

All User Notification

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

⚠️ Manual email generation is not supported.

3.5 Email Footer Customisation

🛠️To Set Up the email signature, applied across all templates

1. Go to **SETTINGS** → **Email Signature.**
2. Enter the signature information as required → **Submit**.

4 SPECIALITY MANAGEMENT

4.1 Overview

Specialities define therapeutic areas (such as Oncology, Cardiology) and support three key functions:

- Linking physicians to their practice fields.
- Associating products with relevant therapeutic areas.
- Controlling physician access to programs associated with that speciality.

4.2 Creating Specialities

🛠️ To Set Up a Speciality:

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

4.3 Deactivating Specialities

When a Speciality is made inactive:

- It is removed from selectable options during **Physician Registration**.
- It remains visible and selectable on existing physician profiles.
- It does not remove any existing associations to products or programs.
    - If a Speciality is linked to a product used in active programs, those programs remain active.
- It can be reactivated at any time.

To deactivate a Speciality and prevent it appearing in new physician registrations:

1. Go to **SPECIALITIES** → **View** → **Edit**.
2. Change the **Status** to **Inactive** → **Submit.**

⚠️At least one Speciality must be active for physician registration.

5 INDICATION MANAGEMENT

5.1 Overview

An Indication defines the medical condition a product is used to treat. In the platform, it ensures that the correct product and dosing regimens are applied within each program.

- Every dosing regimen must have at least one linked indication, and an indication can be linked to multiple products and dosing regimens.
- Indications can also shape program-specific behaviour, including program questions, product limits, and clinical benefit requirements.
- Once an indication is linked to a dosing regimen, and that regimen is added to a program, the indication becomes visible and selectable to physicians during patient request creation.
- Indications must be created in the **Indications** menu before they can be linked to products, associated with dosing regimens, and added to programs.

5.2 Creating Indications

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

5.3 Deactivating Indications

When an indication is made inactive:

- It is removed from selectable options on **Create Patient Requests** for *all* programs that had this indication assigned.
- It remains visible and unchanged on existing patient requests and does not prevent ordering.
- It can be reactivated at any time.
- To retire an indication from select programs only, do not deactivate here - remove it via the program's **Initiation Product Setup** menu.

🛠️To deactivate an Indication:

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

6 PRODUCT INVENTORY MANAGEMENT

6.1 Product Setup Overview

Setting up a product involves a three-step process to build a complete product profile for use in programs:

1. **Create A Product Summary**
   Begin by entering foundational product information. This summary includes key identifiers and general information that form the basis of the product record.
2. **Configure Product SKUs**
   Define the product's Stock Keeping Units (SKUs). These represent the specific variants such as dosages, sizes, and price.
3. **Define Dosing Regimens and Link SKUs**
   Create dosing regimens and link them with the appropriate SKUs to ensure accurate selection within clinical workflows.

6.2 Creating A Product Summary

The product summary captures essential details about the product.

🛠️ To Set Up a Product Summary:

1. Go to **PRODUCTS** → **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** for visual identification in requests and orders.
5. Select one or more **Product Specialities** to control physician access based on their registered specialties.
6. Set **Status** as **Active**.
7. Click **Submit**.

⚠️ Once a product has been added, it cannot be removed from the system.

6.3 Creating Product SKUs

SKUs are essential for making a product orderable. They are important to:

- Uniquely identify product variations (e.g., strength, pack size, or formulation)
- Ensures patients receive the correct medication format for their prescribed regimen
- Enables logistics providers to accurately pick and pack orders
- Supports differentiated pricing across product formats
- Enables accurate order reconciliation

🛠️ To Set Up a Product SKU:

1. In the product, go to **Product SKU** and click **Add New+**.
2. Enter the **Name** (displays in the product details on patient requests, orders and on Order Forms).
3. Enter a **Description** (also appears in patient requests and orders).
4. Enter the **Product SKU** Number (internal reference only).
5. Enter **Free Order Code** if applicable (internal reference only).
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** (can be selected to display 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**.

⚠️ **Editing an existing SKU** (eg name, description, price) will update *all* current, future and past orders. To preserve historical data, instead create a new SKU and assign it to the relevant dosing regimens (see ***Section 6.4.*** on assignment).

⚠️**SKUs cannot be deleted**. To discontinue a SKU, remove its association from the relevant dosing regimens (see ***Section 6.4***.).

6.4 Creating Dosing Regimens

Dosing regimens specify how a product should be administered. They ensure accurate prescribing, streamline pharmacy fulfillment, and align with clinical protocols.

🛠️ To Set Up a Dosing Regimen:

1. In the product, scroll to **Dosing Regimen** and click **Add New+**.
2. Enter a **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**:
   - **Weight-based**: Dose is calculated using patient weight (mg/kg).
   - **Non Weight-based**: Fixed dose.
   - **Non Weight-based Variable**: Fixed dose with flexible quantity.
5. Select **Frequency of Supply**
   - Defines how often the pharmacy can reorder the product (e.g., QW = every 7 days).
   - **Frequency x Quantity:** 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. **Frequency x Quantity** (applicable only for **Non Weight-based Variable** regimens)
   - When enabled, the reorder interval automatically increases based on the quantity ordered, ensuring the next supply is scheduled according to how much was provided
   - Example: frequency = QW (7 days), quantity ordered = 2, the next supply due = 14 days.
7. Enter **Unit Of Measure** to specify the dosing unit. Weight-based regimens automatically use mg/kg.
8. Enter **Dose Strength**.
9. Select **Indications** which this regimen applies to.
10. Link **SKU**s to fulfil the regimen
    - Weight-based regimens: the system auto-calculates the total dose and selects the most efficient SKU combination (lowest price, lowest wastage, lowest vial count).
    - Non weight-based variable regimens: enter minimum and maximum order quantities.
11. Set **Status** as **Active** (selectable) or **Inactive** (not selectable).
12. Click **Submit**.

7 ORDER FORM MANAGEMENT

Order forms are downloadable pdf documents that:

- Enable Admins/Customer Service to request order fulfillment with 3PL (third-party logistics).
- Generate standardised order forms to 3PL providers, with automated data population.
- Can be customised for different programs' specific requirements.
- Ensure accurate and efficient order processing.

7.1 Creating Order Forms

1. Go to **ORDER FORM TEMPLATES** → **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 fields should appear on the order form using the checkboxes
    - Fields will automatically populate with program or patient order details when the form is used
4. Click **Submit**.
5. The template can now be assigned to Programs as required.

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.

7.2 Editing Order Forms

1. Go to **ORDER FORM TEMPLATES** → **View** to open the template.
2. Select **Edit,** make your changes → **Submit.**
3. The changes will immediately apply across all past and future orders using this template.

⚠️ Templates cannot be deleted once created.

8 PHYSICIAN, INSTITUTION AND PHARMACY MANAGEMENT

8.1 Physicians

8.1.1 Registration

- Physicians register via the portal homepage.
- Email validation prevents duplicate accounts.
- New Zealand physicians are not required to enter a registration number.
- All new registrations must be approved before access is granted.
- Physicians receive an email when they submit a registration request; and again when their request is approved or rejected.

8.1.2 Approving or Rejecting Registrations

Administrators are primarily responsible for approving or rejecting registration requests. Customer Service and Approvers can also approve or reject requests, but only Admins receive email notifications for pending registrations.

- From Email (Admins only): Click the link in the email notification to open the pending physician account.
- From Portal (Admins, Customer Service, Approvers):
  1. Go to **PHYSICIANS** → **Waiting Approval**.
  2. Click **View** on the pending physician account.
  3. Select **Approve User** or **Reject User**.

Once a decision is made, the physician receives an email confirming their registration status. Approved physicians also receive a link to set their password.

8.1.3 Profile Management

Profile Management covers all information stored on a physician's profile, including personal details, registration questions, and linked practice locations (Institutions).

8.1.3.1 Profile Updates (Physicians)

Physicians update their own profile information directly from the **PROFILE** menu. This includes:

- Name
- Email address
- Phone number
- Specialties
- Practice Locations (add/remove)
- Registration question responses (providing they have not be 'locked' by Admins during set up)

🛠️ To Update Profile

1. Click **PROFILE** from the top-right menu.
2. Edit the relevant fields → **Submit**.

8.1.3.2 Profile Updates (Administrators & Customer Service)

Administrators and Customer Service can update physician profile information:

- Name
- Email address

- Phone number
- Specialties
- Practice Locations (add/remove)

They cannot view the physician's registration question responses.

🛠️ To Update a Physician Profile:
1. Go to the **PHYSICIANS** menu.
2. Search for the physician and click **View**.
3. Click **Edit** to update details → **Submit**.

8.1.3.3 Access Status Management

Administrators and Customer Service users may need to update a physician's access after their account has been approved.

Rejecting an Active Physician
- The **Reject User** button remains available even after approval. Selecting this option immediately removes the physician's access and sends them a rejection email.

Removing Access Without Sending an Email
- Use this when access needs to be removed quietly. Inactive physicians cannot log in and will not appear in selection lists (e.g., when transferring patient requests). Their account remains visible to Administrators and Customer Service for audit purposes.

🛠️ To deactivate a physician without sending an email:
1. Open the physician's profile.
2. Click **Edit**.
3. Set **Status** to **Inactive**
4. Click **Submit**.

8.1.4 Institution Management (Profile-Level)

*Linking practice locations to a physician's profile. It does not cover creating or editing Institution records - see **Section 8.2.***

Who Can Manage Institutions?
- Physicians
- Administrators
- Customer Service

🛠️ To Add An Institution to A Physician Profile:
- From the profile, go to **My Practice Locations** → **Physician Practice List** → **Add New**.
- Select an Institution → **Submit**.
- Institutions must already exist in the portal before they can be added.

🛠️ To Remove An Institution to A Physician Profile:
- From the profile, go to **My Practice Locations**.
- Click the Bin icon next to the relevant practice.

⚠️ A physician must always have at least one linked Institution. If only one Institution is present, it cannot be removed.

⚠️ Removing an Institution from a physician's profile does not affect previously submitted Patient Requests. Historical Patient Requests retain the originally selected Institution.

8.1.5 Password Management

- Physicians can reset their own password using **Forgot Password** on the Login page (see ***Section 2.4***.)
- For Admin, Customer Service and Approver -Initiated Password Reset:
  1. Go to **PHYSICIANS** → select the physician.
  2. Click **Send Forgotten Password Email**.
  3. The reset link is valid for one hour.

8.2 Institutions (Practice Locations)

System-level Institution records.

What Is an Institution?

- An Institution represents a physician's practice location.
- Physicians can link multiple practice locations to their profile.
- During patient enrollment, physicians choose the Practice where the patient is being treated.
- Admins/CS can update the selected practice on a Patient Request if required.

8.2.1 Creating Institutions

For Physicians:

1. During registration: Select an existing institution or enter a new one.
   - New institutions become available to all physicians when registering.
2. Post-registration: Add via their **Profile**.

For Administrators, Customer Service, Approvers:

1. Go to **INSTITUTIONS** → **Create**.
2. Complete details → **Submit**.

8.2.2 Managing Institutions (Updates or Deactivation)

For Administrators, Customer Service, Approvers:

1. Go to **INSTITUTIONS** → **View** the institution.
2. Click **Edit** to update details → **Submit**.

To Deactivate:

- Set the **Status** to **Inactive** → **Submit**.
- Deactivated institutions:
  - No longer appear during physicians registration.
  - No longer appear when creating new Patient Requests.
  - Remain linked to previously submitted patient requests for data integrity.

8.3 Pharmacies

Pharmacies are provided with accounts to manage orders for enrolled patients. Accounts can be created by:

- Physicians
- Administrators
- Customer Service
- Approvers

8.3.1 Roles & Permissions

Each pharmacy account must have one Primary User and may include up to two active Team Members:

Role	Permissions
Primary User	Full access: can manage pharmacy details, orders, and team members. Can access resources. ⚠️ Country cannot be changed once set.
Team Member	Limited access: can place orders, view patient requests, and access resources. Cannot manage users or edit pharmacy details. ⚠️ Only the Primary User can add/remove Team Members.

8.3.2 Creating Pharmacy Accounts

Created By Physicians (during Create Patient Request process):

1. In the patient request form, select **Check to enter details for a New Pharmacy**.
2. Enter the pharmacy's details.
3. Once the request is submitted, the primary pharmacy user receives an email to complete account setup.

Created By Administrators, Customer Service or Approvers:

1. Go to **PHARMACIES** → **Create**.
2. Enter the Pharmacy **Name**.
3. Set **Status** to **Active** (makes it selectable by physicians).
4. Enter the **Primary User Details**.
5. Enter the Pharmacy's Primary **Address**.
6. For delivery details
   - Select **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 **Alternate Pharmacy Delivery Details** if required.
8. Click **Submit**.
   - A setup email is sent to the Primary User.

8.3.3 Preventing Duplicate Accounts

🚫 To avoid duplication errors during pharmacy creation:

- The system checks for matches in Name, Street, and Suburb.
  - If any two fields match an existing record, a duplication error is triggered.
- The primary user's email address must be unique and not used in any other pharmacy account.

8.3.4 Managing Pharmacy Details

8.3.4.1 Pharmacy Email Address (Communication Email)

After initial account creation, pharmacies can nominate a dedicated email address for key communications (e.g., patient enrolments, order confirmations). This email:

- Can differ from the Primary User's login email.
- Supports team coordination while preserving individual account security.

🛠 To Update the Communication Email:

- Primary Pharmacy Users: Go to **PROFILE** → **Pharmacy Details** → **Email**
- Administrators and Customer Service: Go to **PHARMACIES** → **View** → **Edit** → **Email**

8.3.4.2 Pharmacy User Email (Login Email) Updates

Pharmacy users may need to update their own login email address.

🛠 To Update Login Email:
Pharmacy Users:

1. Go to **PROFILE** → **Email**.

Administrators and Customer Service:

1. Go to **PHARMACIES** → **View** the pharmacy.
2. In the **Users** table, select the user → **View** → **Edit** to update the user's **Username** and **Email** fields.
3. Click **Submit**.

8.3.4.3 Physical Address Management

Pharmacies may have multiple addresses for identification and delivery.

Type	Purpose
Primary Address	Visible to physicians when nominating pharmacy during Create Patient Request
Primary Delivery Address	Used for standard deliveries
Alternate Delivery Address	Used for specialised deliveries (e.g. compounding); includes separate contact email

8.3.5 Team Member Management

🛠 To Add Team Members (Primary User only):

1. Go to **PROFILE** → **Pharmacy Team Members** → **Add New**.
2. Enter the Team Member's name and email address.
3. Click **Submit**. The user will receive a password setup email.

🔒 Administrators and Customer Service cannot add team members but can manage users once created.

🛠 To Deactivate Team Members:

- Pharmacy Primary user:

1. Go to **PROFILE** → **Pharmacy Team Members**
2. Uncheck the user's **Status** box.

🔓 This frees up one of the two available Team Member slots for a new member.

- Admins, Customer Service, Approvers:
  1. Go to **PHARMACIES** → **View** the pharmacy.
  2. In the **Users** table, find the Team Member → **View**.
  3. Click **Reject User**.

🛠️ To Override the Team Member Limit (Admins, Customer Service and Approvers) and allow more team members:

1. Go to **PHARMACIES** → **View** the pharmacy.
2. In the **Users** table, find the inactive Team Member → **View**.
3. Click **Approve User**.

8.3.6 Password Management

- Pharmacy users can reset their own password using **Forgot Password** on the Login page. See ***Section 2.4*** for full instructions
- For Administrators and Customer Service-Initiated Password Reset:
  1. Go to **PHARMACIES** → **View** the pharmacy.
  2. In the **Users** table, select the user → **View**
  3. Select **Send Forgotten Password Email**.
  4. The reset link is valid for one hour.

8.3.7 Pharmacy Deactivation

Deactivating a pharmacy will:

- Remove it from physician selection during Create Patient Request.
- Prevent pharmacy users from logging in or managing orders.
- Keep the account accessible to Admins and Customer Service for future reactivation.

🛠️To Deactivate A Pharmacy:

1. Go to **PHARMACIES** → **View** the pharmacy.
2. Confirm no active patients are linked to the pharmacy.
3. Click **Edit**, set **Status** to **Inactive**, and click **Submit**.

9 PROGRAM SETUP

9.1 Understanding Program Statuses

A program can have one of three possible statuses:

1. **Active**: The program is currently active and falls 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. 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. Not visible or selectable for new requests, and active orders are cancelled.

9.2 Preparing for Program Creation

Before creating a program, ensure all prerequisites are completed:
1. Add Speciality areas.
2. Add Indications.
3. Add Products with SKUs and dosing regimens.
4. Add Order Form template.

Administrators create programs via the **PROGRAMS** menu.

9.3 Defining Program Details

🛠️ To Set Up a New Program Structure:
1. Go to **PROGRAMS** → **Create**.
2. Enter a unique program **Name**. This name is displayed to all users.
3. Select **Countries**. Choose the countries this program applies to.
   - The program is visible only to physicians registered in the selected countries.
   - Physicians can nominate only pharmacies registered in those countries.
   - If multiple countries are selected, the program operates as a multi-country program with a unified configuration. See ***Section 9.3.1*** Country Configuration for more details.
4. Enter Descriptions:
   - **Description For Doctor**: displays when creating patient requests
   - **Description For Pharmacy**: displays on orders.
5. Select program **Start** and **End Dates** (activates 12:00 AM AEST start, ends 11:59 PM).
6. Select **Program Type** (displayed on requests and orders).
7. Enter **Program Codes** (used for Order Forms).
8. Set patient request approval rules:
   - **Auto-Approve Patient Requests** OR
   - **Approval Type**:
     - No specific approver required: any portal approver can approve.
     - ALL nominated approvers must approve (configured in **Program Approvers**, ***Section 9.4***)
     - ANY ONE nominated approver can approve (configured in **Program Approvers**)
   - **Reset Approval Flow on PR Resubmission:**
     - When enabled, if a physician updates and resubmits a *Returned* patient request, all approvers must review it again from the start.
     - When disabled, previously completed approvals remain valid.
9. Select **User Type With Ordering Permissions** (the user responsible for ordering).
10. Select **Pharmacy Management Type**:
    - **Centralised Pharmacy Management**: Only designated pharmacies can be selected on requests.
    - **Decentralised Pharmacy Management**: Any registered pharmacy can be selected.
11. Enter **Minimum Patient Age** (automatically validated against patient's DOB).
12. Select the **Ordering Type**:
    - **Fixed**: **Carry Forward Last Dosing Regimen (Orders Are Locked)**: selected dosing regimen cannot be changed by pharmacy; patient weight or product (variable) quantity can be amended.
    - **Variable: Carry Forward First Dosing Regimen (Orders Can Be Amended)**: physician selected dosing regimen displays on orders, can be amended by pharmacy.

- **Variable: Carry Forward Last Dosing Regimen (Orders Can Be Amended)**: last ordered dosing regimen displays on orders, can be amended by pharmacy.
- **Variable: No Dosing Regimen Carried Forward (Orders Can Be Amended)**: no dosing regimen displays, must be selected by pharmacy.
- Note: This rule applies to all program orders, except those subject to the Order Variation rule (see ***Section 9.5.2***).

13. Enter **Early Ordering Window**: 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 uses pricing rules.
15. Select **Order Form Template** from the available list.
16. Select **Status**:
    - Active: the program goes live on the start date. Administrators can preview the program - indicated by '(Preview)' next to the program name in the Program dropdown.
    - Inactive: the program will not activate on the Start Date.
17. Click **Submit** to create the program

After submitting, scroll down to configure the remaining program components: Program Approvers, Products, Product Limits, Pricing Conditions, Questions and Clinical Benefit.

9.3.1 Country Configuration

A concise reference for single-country vs multi-country programs.

Single-Country Programs

- Program applies to one country
- Physicians and pharmacies must be registered in that country
- All configuration applies only to that country

Multi-Country Programs
If more than one country is selected:

- All selected countries share one unified configuration
- No country-specific variants (products, pricing, limits, questions, etc.)
- Physicians can nominate pharmacies from any selected country
- Use only when all countries follow the same rules

Country Configuration Quick Reference

Requirement	Multi-Country Program	Separate Programs
Same indications, products and dosing regimens across countries	✔ Required	✘ Not required
Same product SKUs and prices	✔ Required	✘ Not required
Same pricing rules	✔ Required	✘ Not required
Same ordering rules	✔ Required	✘ Not required
Same program dates	✔ Required	✘ Not required
Cross-country pharmacy nomination	✔ Supported	✘ Not supported
Country-specific variants	✘ Not supported	✔ Supported

9.4 Assigning Approvers

Programs that require designated reviewers must have approvers added under **Program Approvers**. If the program is set to allow *any* portal approver, assigning specific approvers is not required.

How It Works:
- Non-Sequential Approval: Approvers can act in any order, no sequence is enforced.
- Instant Notifications: Assigned approvers receive an email when a PR is submitted.
- Restricted Button Access: Only assigned approvers and Administrators see request action buttons.
- Single Rejection Rule: If any approver rejects the request, the PR is automatically rejected.
- Administrator Override: Administrators can singularly approve or reject any PR.
- Live Updates: Changes to approver assignments apply immediately to pending PRs.
- Audit Trail: Approver actions are logged in the PRs **Administrator Tracker**, visible to Administrators and assigned approvers.
- Track Pending Requests: All PRs awaiting review appear under Patient Requests > Pending Approval.
- If No Approver is Set Up: PRs remain in *Pending Approval* until an Administrator takes action.

🛠️ To Set Up Approvers (after selection in program set up **Approval Type**):
1. Go to the program's menu → **Program Approvers** → **Add New**.
2. Select approvers from the dropdown list (only active approvers appear).
3. Click **Submit**.
4. To add more approvers, repeat steps 2–4.
5. For active programs, click **Apply Approver Changes** to apply updates to pending PRs.

🛠️ To Remove Approvers:
1. Go to the program's menu → **Program Approvers**.
2. Click the **bin icon** next to the approver's name.
3. For active programs, click **Apply Approver Changes** to apply updates to pending PRs.

9.5 Adding Products, Indications and Dosing Regimens

9.5.1 Initiation Products & Dose Regimens

Add the products, indications, and dosing regimens to display on new patient requests and for standard subsequent orders.
- Each product must be added only once; duplicates prevent the system from distinguishing between them.
- Add only the dosing regimens that should be available from patient initiation.
- Custom or order-specific dosing (e.g., titration) must be configured separately in **Order Variations** (see ***Section 9.5.2***.)
- Ensure product details are set up in the **Product** menu before proceeding.
- Once a program is Active:
    - Making a product Inactive removes it from all new patient requests and from all orders, past and present.
    - Removing an indication from a product's dosing regimen will remove that indication and the related product from all future orders for any patients already enrolled under that indication. Those patients will no longer see the product on their orders.

🛠️ To Set Up Initiation Products & Dosing Regimens:

1. Go to the program's menu → **Initiation Product Setup**→ **Add New**.
2. Enter the product **Name** as it should appear to physicians and pharmacies.
3. Select the product from the **Product** dropdown.
4. Select the dosing regimens to display from the **Dosages** dropdown. (Dosing regimens will be listed in alphabetical order on new Patient Requests and Orders.)
5. Select the **Indication(s)** for each regimen.
6. Add one- to many- dosing regimens as needed.
7. Set **Status** to **Active**.
8. Click **Submit**.
9. Repeat steps to add additional products for combination therapy programs.

9.5.2 Order Variations

- Order Variations allow custom dosing regimens (e.g., titration) to be applied to specific orders.
- They override the program's standard ordering schedule for those orders only and cannot be used for initial patient requests.
- Variations can only be applied to products that are first configured in **Initiation Product Setup** and are actively being ordered by the pharmacy. Products that do not meet these conditions will not activate in the program.
- When Order Variations are applied to an order:
  - The program's default Ordering Type (e.g., "Last dosing regimen carried forward") is overridden to allow for the dynamic nature of new available doses.
  - The pharmacy sees the first dose from the variation list by default.

🛠️ To Set Up an Order Variation:

1. Go to the program's menu → **Order Variations** → **Add New**.
2. Enter a **Name** that will be displayed in the Product field on 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 variation:
   - Single order: enter a single number (e.g., 2).
   - Multiple orders: separate numbers with commas (e.g., 2, 4).
   - Order range: use hyphen (e.g., 2-4).
   - Unlimited orders: use an asterisk (*) (e.g., 2-*).
5. Select the **Product** (noting the requirements above).
6. Select the **Dosing Regimen(s)**:
   - For **Fixed** only one dose can be selected, for **Variable**, multiple doses can be chosen
7. Select the **Indications** for each dosing regimen.
8. Set the **Status** to **Active**.
9. Click **Submit**.
10. Repeat as needed for other orders / dosing regimens.

9.5.3 Loading Dose Configuration Example

This configuration displays a loading dose of *240mg Q4W* on the Patient Request and Order 1 only, with all subsequent orders defaulting to *120mg Q4W*.

Step	Purpose	Configuration
1. Initial Dose	Display loading dose on Patient Request + Order 1	Add 240mg Q4W under Initiation Product Setup
2. Maintenance Dose	Apply fixed dose from Order 2 onward	Add 120mg Q4W under Order Variations (Orders 2–*)

🛠️ **Step 1: Set Up Initial (Loading) Dose**
Go to **Initiation Product Setup** → **Add New+** and enter:
- **Name**: Product A
- **Product**: Product A
- **Dosages**: 240mg Q4W
- **Indication**: Select relevant indication(s)
- *(Optional)*: Add an alternate dosage if the loading dose is not mandatory
- **Status**: Active

Click **Submit**.

🛠️ **Step 2: Set Up The Ongoing Maintenance Dose**
Go to **Order Variations** → **Add New+** and enter:
- **Name**: Product A
- **Condition Type**: Fixed
- **Orders**: 2-*
- **Product**: Product A
- **Dosages**: 120mg Q4W
- **Indication**: Select relevant indication(s)
- **Status**: Active

Click **Submit**.

9.5.4 Titration Schedule Example

This example shows how to configure a progressive titration schedule:

Order Range	Available Doses
Order 1	5mg (fixed)
Orders 2-3	5mg, 10mg
Orders 4+	5mg, 10mg, 15mg

🛠️ **Step 1: Set Up Starting Dose**
Go to **Initiation Products & Dose Regimens** → **Add New+** and enter:
- **Name**: Product A
- **Product**: Product A
- **Dosages**: 5mg

- **Indication**: Select relevant indication(s)
- **Status**: Active

Click **Submit.**

🛠️ **Step 2: Set Up Dose Variations For Orders 2–3**

Go to **Order Variations** → **Add New+** and and enter:

- **Name**: Product A
- **Condition Type**: Variable
- **Orders**: 2-3
- **Product**: Product A
- **Dosages**: 5mg, 10mg
- **Indication**: Select relevant indication(s)
- **Status**: Active

Click **Submit**.

🛠️ **Step 3: For Order 4 onward**

Repeat the process with

- **Orders**: 4-*
- **Dosages**: 5mg, 10mg, 15mg

Click **Submit**.

9.6 Adding Pricing Conditions

Pricing conditions define rules for program-related costs. These are optional and only required when:

- The program is not free, or
- Pricing needs to differ from the standard SKU pricing set in the **Product** menu.

⚠️ Each product in a program can only have 1 active pricing condition.

Available Pricing Rule Types:

Rule Type	Description
Threshold-Based	Orders are paid until a financial or order count threshold is reached. After that, all orders are free, either indefinitely or for a set number of orders or weeks.
Alternating Buy-Free Orders	Orders alternate between paid and free (or vice versa) until a financial or order count threshold is reached. After that, all orders are free, either indefinitely or for a set number of orders or weeks.
Buy X Orders, Get Y Orders Free	After a set number of paid orders (X), the next Y orders are free. This can be set to repeat or run once.
Get X Orders Free, Buy Y Orders	After a set number of free orders (X), the next Y orders are paid. This can be set to repeat or run once.

🛠️ To Set Up a Pricing Condition:

1. In the program, go to **Pricing Conditions** → **Add New**
2. Enter a **Name** (not visible to users).
3. Select **Order Type Affected:** the price rule will apply to this order type once triggered
   ⚠️ If 'Odd Orders' or 'Even Orders' is selected, the alternate order will start as free and remain free free until the threshold is met. After that, all orders become free.

4. Select **Action When Triggered:** this is applied to the orders once the threshold is met - currently only 'Free of Charge' is available.
5. Select the **Rule Type**
   - Threshold-based (Financial or Order count)
   - Buy/Free combinations (e.g., Buy X, Get Y Free)
6. Enter the **Threshold Quantity**:
   - Threshold-based rules: the number of orders or the total cost required to trigger free orders.
   - Buy/Free rules: the number of free or paid orders corresponding to the first part of the rule.
7. Set **Duration Type** to choose how long the rule remains active once triggered. Select 'Continues for Program Duration' for no limit and move to Step 10.
   ⚠️ For Paid/Free Orders threshold type, 'Orders Placed' must be selected to set the number of paid to free (or vice versa) orders.
8. Enter **Duration Value**:
   - For threshold-based rules: enter the number of weeks or orders which free orders apply.
   - For Buy/Free rules: enter the second value in the setup (e.g., number of free orders after paid ones).
9. Select the **End-Of-Rule Action**. 'Repeat' is only applicable for Buy/Free rule types.
10. Assign the **Product** this pricing condition applies to.
11. Set **Status** to **Active** and click **Submit.**

✅ Best Practice: If you need to modify a pricing condition, create a new one and set the old condition to **Inactive**. This approach ensures audit trails and tracking. This will apply the new condition to all active patient requests in the program.

9.7 Adding Product Ordering Limits

Product limits control how many orders can be placed for a product in a program. They help enforce program rules and ensure patients receive only the approved quantity of treatment.

How Product Limits Work:

- You can set multiple limits in a program - by product, by indication, or both.
- When a limit is reached, the system stops generating new orders for that product.
- When all limits are reached for a patient, the Patient Request status updates to 'Complete'. Once this status is reached, it cannot be reversed unless the order is able to be Cancelled.

🛠️To Set Up a Product Limit:

1. In the program, go to **Product Limits** → **Add New**.
2. Enter **Name** (not visible to users).
3. Set **Order Limit Value** (number of orders allowed).
4. Select **Limit Type** of **Orders**.
5. Select **Product Completed** as **Action When Limit Met**.
6. Select **Indication**: Choose the specific indication or check **Apply Limit to All Indications**.
7. Select **Product**.
8. Set **Status** to **Active**.
9. Click **Submit**.

✅ Best Practice: If a Product Limit needs to be adjusted (e.g., increased or decreased), create a new one and set the old limit to **Inactive**. This approach ensures audit trails and tracking. This will apply the new limit to all active patient requests in the program.

9.8 Adding Program Questions

Program questions are used to collect structured information from physicians and pharmacies at key program stages. They support eligibility screening, physician opt-in, and pharmacy order conditions.

Where Questions Appear:

Stage	Audience	Purpose
Create Patient Request	Physicians	Eligibility Criteria, Physician Opt-in
Order Submission	Pharmacies	Order Conditions

Once answered, questions and their responses are displayed on the submitted Patient Request or completed Order, visible to all users.

Question Types:

- 7 question types include: 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, go to **Question Builder** → **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**.
   - 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. For dropdown or radio buttons: separate **Responses** with a comma.
6. Check **Required** to make the question mandatory.
7. For radio buttons: set the **Number Of Columns** to control layout.
8. Select **File Type**: Choose No file, Resource (from all uploaded resources), or File (for document upload).
9. Select **Category** to specify where the question will appear (Eligibility, Opt-in, etc.).
10. Select the **Indication(s)** the question will display for (or apply to all indications).
11. Optional:
    - **Hide Question Once Answered:** Prevents display after submission.
    - **Lock Question Once Answered:** Prevents response edits by Admin or Customer Service
12. Set **Status** to **Active**.
13. Click **Submit**.

🧭 Tips:

- Use **Order Question Layout** to adjust the display of order of questions.
- The **Live Question Editor** shows layout only — not actual responses or files, however URL links are clickable.

9.9 Adding Central Pharmacy Distribution

When **Central Pharmacy Management** is enabled for a program, only nominated pharmacies will appear in the **Nominate A Pharmacy** dropdown on **Create Patient Request**. This ensures that physicians can only select from a predefined pharmacy list.

🛠️ To Set Up a Pharmacy as a Centralised Pharmacy:
1. Go to **PHARMACY** → **View** the relevant pharmacy.
2. Check the box **Enable As Central Pharmacy**.
3. In the program's menu, go to **Central Pharmacy Management** → **Add New**.
4. Select the pharmacy from the list of available central pharmacies.
5. Click **Submit**
6. Repeat Steps to add additional pharmacies as needed.

🛠️ To remove a Centralised Pharmacy from a program:
1. Go to **PROGRAMS** → **View** on the relevant program.
2. In the **Central Pharmacy Management** table, uncheck the pharmacy's **Status** checkbox to remove the pharmacy from being displayed on new patient requests.
   ⚠️ This does not affect existing patient requests where the pharmacy has already been nominated.
3. Ensure that at least one central pharmacy remains active for the program.

🛠️ To remove a pharmacy from being selectable as a Centralised Pharmacy on *any* program:
1. Go to **PHARMACY** → **View** the relevant pharmacy → **Edit**.
2. Uncheck the box **Enable Selection As Central Pharmacy**.
3. Click **Submit**.

9.10 Adding Clinical Benefit Assessments

Used to verify that a patient is experiencing therapeutic benefit before additional orders can be placed. Triggered based on order count or price thresholds. Assessments can be configured for:

- One or multiple products
- One or multiple indications
- One or multiple times during the program, per patient

How it works:
1. During program set up, Admin sets a threshold: order count, price, or Q2W order equivalency (Order Equivalency means to the number of Q2W-equivalent orders supplied, allowing CB assessments to be triggered more consistently across different product frequencies and order quantities).
2. Once the threshold is <u>exceeded</u>:
   - The next order is locked 'Pending Clinical Benefit' in **Waiting For Pharmacy** Status.
   - A notification is sent to the treating physician (for action), and the nominated pharmacy (not for action).
   - An assessment (pop-up notification) appears on the patient request.
3. Physician (or Admin) completes the assessment:
   - "Yes" unlocks the next order
   - "No" or no responses keeps the order locked
4. The timestamped response and response type is logged on the Patient Request.
5. An email notification is sent to Program Administrators confirming completion of the assessment.

🛠️To Set Up an Assessment:

1. In the program, scroll to **Clinical Benefit** → **Add New**.
2. Enter a **Name** (internal use only).
3. Select **Threshold Type**.
4. Enter **Threshold Value/Price** (the assessment triggers AFTER this value is reached).
5. Select **Product** and **Indication**.
6. Set the **Status** to **Active.**
7. Repeat steps for additional assessments.

⚠️If you add a CB assessment to a program after it is Active, the rule is applied immediately and retrospectively. See ***Section 11.8.***

10 MANAGING ACTIVE PROGRAMS

10.1 Patient Requests

Patient Requests are the foundation of the Medicine Access Platform. They capture physician-submitted information about a patient, their eligibility, and pharmacy preferences. Once approved, they unlock the ability to place orders. Each enrolled patient is assigned a unique patient ID number, generated sequentially based on the date and time of their submission.

10.1.1 Roles and Access

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

- Physicians: Can submit requests for programs linked to their Specialty area, and view their linked requests.
- Pharmacies: Can only view patient requests assigned to their pharmacy.
- Administrators, Customer Service, Approvers, and Observers: Can view all requests (some limitations on visible details apply depending on user type).

10.1.2 Patient Request Status Types

Status	When It Appears	What It Means
Pending Approval	Request has been submitted	Awaiting review and approval
Active	Request has been approved and is in progress	Patient is actively enrolled and eligible for orders
Returned	Request was reviewed and sent back to physician for changes	Awaiting update in order to be rereviewed
Rejected	Request was reviewed and denied	Patient is not eligible or did not meet program requirements
Closed	Program has ended and patient is no longer enrolled	No further activity or orders will occur under this program
Complete	All associated orders are fulfilled	Request has been fully processed; no further actions needed
Cancelled	Request was cancelled by physician or Admin	No services will be provided; the request is inactive

10.1.3 Submitting Patient Requests (Physician Workflow)

Physicians submit requests for active programs matching their specialty.

🛠️ Steps To Submit:

1. Go to **PATIENT REQUESTS** → **Create Request**.
2. Select your practice (if multiple are registered).
3. Complete program details:
    - **Program, Indication**, **Product**, **Dosing Regimen**

    - Dosing Regimen - If Variable Quantity is enabled, select **Amount**, if Dosing Regimen is weight-based, enter **Patient Weight**
4. Enter patient information:
    - Initials, Gender, Date of birth, Expected treatment date
5. Complete any **Eligibility Criteria**.
6. **Nominate a Pharmacy** or add a new one.
7. Answer physician **opt-in** questions.
8. Click **Submit**.

10.1.4 Saving Patient Requests as Draft

Physicians can save a partially completed patient request as a draft and return to it later to complete and submit. Drafts remain private to the submitting physician, and are also visible to Administrators and Customer Service for support purposes. Drafts do not enter the approval workflow until they are submitted.

🛠️ Steps To Create Drafts:
1. Go to **PATIENT REQUESTS** → **Create Request**.
2. Enter available patient or program details.
    - Minimum required fields to save a draft: **Practice, Program, Indication,** and **Patient Initials**.
3. Click **Save As Draft** instead of **Submit**.

What Happens Next
- The draft appears in the physician's **Drafts** list.
- Drafts can be reopened, edited, and either:
    - Submitted for approval, or
    - Saved again as an updated draft.
- Drafts can be deleted if they are no longer required.
- Drafts do not generate notifications.
- Drafts are not visible to pharmacies, even if the pharmacy has been nominated.

Administrator and Customer Service Access
- Administrators and Customer Service can view and edit physician drafts via:
    - **PHYSICIANS** → Locate physician profile → **Draft Patient Requests**
    - **PATIENT REQUESTS** → **View Drafts**

10.1.5 Approval and Rejection

Approvers and Administrators can review and approve/reject new patient requests. (For more on assigning Approvers, see ***Section 9.4*** – Program Approvers.)

🛠️Steps to Review:
1. An email notification is sent to assigned Approver(s) when a patient request is submitted.
2. Click the link in the email to log in and view the pending patient request.
   Alternatively, go to **PATIENT REQUESTS** → **Pending Approval.**
3. Review all submitted details.
4. Click **Approve Request** or **Reject Request**.
   ⚠️ Requests cannot be amended whilst pending approval.
5. In the pop-up, enter a reason for the decision and click **Approve** or **Reject**.

What Happens Next:

- The decision and reason are recorded in the patient's **Administration Tracker**, visible to Administrators and nominated Program Approvers.
- If rejected:
  - The reason is displayed on the patient request.
  - The submitting physician receives an email notification.
- If approved: An email notification is sent to the submitting physician.
  - The submitting physician and nominated pharmacy receives an email notification.
  - The patient's first order is generated.

10.1.6 Returning Patient Requests

A patient request is **Returned** when the Approver or Administrator identifies information that must be corrected before the request can be approved. Returned requests must be updated by the submitting physician and resubmitted to re-enter the approval workflow.

🛠️Steps To Return A Patient Request:

1. Go to **PATIENT REQUESTS** → **Pending Approval**.
2. Select the request requiring changes.
3. Click **Request Revision**.
4. In the pop-up window, enter feedback describing what must be updated.
5. Click **Request Revision**.

What Happens Next:

- Request status updates to **Returned**.
- The physician receives an email notification.
- Revision reason is visible on the request.
- Request becomes editable by the physician.
- Request remains on hold until resubmitted.

Physician Actions on Returned Requests:

- Open the request from the **Returned** list.
- Review the feedback provided.
- Update the required fields.
- Resubmit the request for approval.
- Save progress without submitting (if further information is pending).

10.1.7 Amending Patient Requests

Administrators and Customer Service can amend select details on **Active** requests only:

- Patient initials
- Date of birth
- Gender
- Eligibility criteria questions
- Uploaded documents
- Nominated pharmacy

⚠️ The treating physician and program details cannot be changed.

⚠️ Pharmacy updates: Updating the nominated pharmacy will assign the new pharmacy to all future orders. It does not change the pharmacy displayed on previously **Sent** orders for the patient.

🛠Steps To Amend:

6. Go to **PATIENT REQUESTS** and search for the patient.
7. Click **View** and edit the necessary fields.
8. Click **Update Details** (button activates once changes are made).
9. In the pop-up window, select the reason for the update and click **Update Details**.

Changes are logged in the **Administration Tracker Activity Log**, visible to Administrators and nominated Program Approvers. The log records the reason, the user who made the change, and the date.

10.1.8 Data Handling: Deletion & De-identification

Patient records cannot be deleted from the system. This preserves audit integrity and ensures a complete history of program activity is retained.

If identifiable information needs to be removed, Administrators can apply de-identification by replacing personal details with non-identifiable placeholders. This removes patient identifiers while keeping the underlying request record available for audit, reporting, and program continuity.

10.1.9 Transferring a Patient to a New Physician

Admins/Customer Service can update a patient's treating physician when transfer of care is required.

🛠 Steps to Change Physician:

1. Go to the **PATIENT REQUESTS** menu and locate the patient.
2. Click **View**, then under **Select New Doctor**, choose a new physician and their practice.
3. Once selected, click **Update Details**.
4. Enter a reason (recorded on the patient **Activity Log**) and click **Update Details** again to save.

Once Updated:

- The new physician receives an email notification of the transfer.
- The patient and all their orders become visible to the new physician (and no longer visible to the incumbent physician).
- Transfer details are visible in the Care History table on the patient request.
- Previously **Sent** orders retain the name of the previous treating physician.

10.1.10 Transferring a Patient to a New Pharmacy

Admins/Customer Service can update a patient's nominated pharmacy to manage future orders:

🛠 Steps to Change Pharmacy:

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

Once Updated:

- The new pharmacy receives an email notification of the transfer.
- The patient request and any **Waiting For Pharmacy** orders become visible to the new pharmacy (and no longer visible to the incumbent pharmacy).

- Transfer details are visible in the Care History table on the patient request.
- Previously **Sent** orders retain the name of the previous responsible pharmacy.

10.1.11 Cancelling Patient Requests

Cancellations can be actioned by physicians or Administrators.

🛠️Steps To Cancel:
1. Go to **PATIENT REQUESTS** and search for the patient.
2. Click **View** → **WITHDRAW PATIENT** at the bottom of the request.
3. Confirm by clicking **Ok**.
4. The Patient Request **Status** updates to **Cancelled**. All associated active orders are also cancelled.
5. The treating physician receives an automated confirmation email of patient withdrawal.

⚠️ Cancelling permanently removes the patient and pending orders from the program. This action cannot be reversed.

10.1.12 Enabling Special Conditions

Special Conditions allow exceptions to standard program pricing for individual patients. When enabled, Admins/Customer Service can manually adjust pricing on free orders, normally locked.
⚠️ Special Conditions cannot be used in Free Programs.

What Happens When Special Conditions Are Enabled:
- A Special Conditions notification appears on:
  - The Patient Request, to highlight awareness of approved pricing/access variations
  - All patient orders, guiding Pharmacy, Customer Service/Admins during submission and review.
- Pricing Behaviour:
  - System-calculated pricing follows standard program rules unless manually adjusted.
  - Manual price changes can only be made by Customer Service or Admins.
  - Price adjustments are only allowed when the order is in **Waiting For Customer Service** Status or **Sent** Status (for the last **Sent** order only).
  - An **Unlock Price** button appears on free orders, allowing price adjustments.

⚠️ Free order pricing is locked by default and can only be overridden if Special Conditions is active.

🛠️ To Enable Special Conditions:
1. Go to **PATIENT REQUESTS** and locate the patient.
2. Click **View** and scroll to the **Administration Tracker**.
3. Toggle **Special Program Conditions** to **Yes**.
4. Enter explanatory text in the **Arrangement Details** field.
   - This text appears on the Patient Request and on every patient order.
   - Only include details relevant to the physician and pharmacy managing treatment.
   - For internal-only notes, use **Patient Notes**.
5. Click **Update Details** to save.

To Disable Special Conditions:
1. Repeat steps 1-2 above and toggle **Special Program Conditions** to **No**.
2. Click **Update Details** to confirm.
3. The notification and ability to override free pricing on future orders is removed.

10.1.13 Patient Notes

Administrators and Program Approvers can add notes to Active patient requests to document necessary information. Notes are not visible to other user types.

🛠️ To Add Patient Notes
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**) to save.

10.2 Order Management

This section outlines how internal users manage the full lifecycle of patient orders — from submission to confirmation, amendment, and cancellation.

10.2.1 Overview and Access

- When a patient request is approved, the system automatically generates the first order with a unique Order ID.
- Subsequent orders are created each time an order is marked as **Sent**.
- Orders are accessed via the **ORDERS** menu. Visibility is role-based:

User Role	Access
Physicians & Pharmacies	Orders linked to their patients
Admins, Customer Service, Approvers, Observers	All orders across the platform

10.2.2 Order Lifecycle and Status Types

Status	When It Occurs	What It Means
Waiting For Pharmacy	First stage after request approval **or** start of a new order cycle after a Sent order	Order is in pharmacy queue; not yet placed
→ Waiting For Customer Service	After Pharmacy submits an order	Admin/Customer Service must review and confirm
→ Awaiting Shipment *(sFTP-integrated programs only)*	After Admin/Customer Service Confirms an order	Order file sent to 3PL; awaiting shipment receipt file from 3PL
→ Sent	Final stage after confirmation (or after 3PL file receipt for sFTP orders)	Order is finalised
Cancelled	Can occur at any point in lifecycle	Linked orders are voided or regenerated for future placement

10.2.3 Submitting Orders

Who can submit:
- Pharmacies (primary responsibility).

- Administrators (if required).

When to submit:
- After the **Unlock Order Date**. Before this date, orders remain locked.

🛠️ Steps To Submit:
1. Go to **ORDERS** → **Waiting for Pharmacy**.
2. Locate the patient and click **View**. Ensure the order is unlocked.
3. Complete required fields (e.g., dosing regimen, quantity, patient weight).
4. For multi-product programs, check if additional products should be added to *Order 1*. (If added, the system will flag “Product Added To Order” for Administrators and Customer Service.)
5. Select delivery location; update the 3PL account number if needed.
6. Click **Submit Order**.
7. Status changes to **Waiting For Customer Service**; notification is sent to Customer Service.

⚠️ Note: If Special Conditions are enabled for a patient, Admins/Customer Service can see a ‘Unlock Price’ button on Free orders to reveal standard SKU prices. Pharmacy do not have access to this view.

10.2.4 Unlocking Orders For Early Placement

Who can unlock:
- Administrators
- Customer Service

🛠️ Steps To Unlock:
1. Go to **ORDERS**, locate the patient order and click **View**.
2. Check the **UNLOCK ORDER** checkbox.
3. Adjust the **Due Date** with a date within the orderable period and click **Apply**.
4. Click **Submit**, enter a reason (visible in Order Adjustment Log), and click **Submit** again.
5. If the new date complies with program rules, the order will unlock for submission.

10.2.5 Amending Submitted Orders

Who can amend:
- Administrators
- Customer Service

When:
- When the order status is **Waiting For Customer Service**.

Editable Fields:
- Dosing Regimen
- Patient Weight
- SKU Quantity
  - For variable quantity dosing regimens, if a value outside the predefined options is entered, the **Set Amount** field will display **(edit)** to indicate a custom quantity. This does not appear on order forms or reports.
- Unit Price
  - Paid Programs only. Free price orders *cannot* be amended unless ‘Special Conditions’ have been activated on the patient request.

- Missing Products (Order 1 only) - add via **Product** dropdown.

⚠️ Multi-product programs: deleting a product from Order 1 permanently removes it from being orderable for that patient in future. Only remove a product if it will not be required again.

🛠️ Steps To Amend:
1. Open the order and scroll to the **Product** section.
2. Edit fields; dependent calculations (e.g., vial count, price) update automatically.
3. Click **Save Order Changes.**
4. Enter reason and supporting details, then click **Save Order Changes** again to confirm.
5. All amendments are saved on the order and reflected in the order form.

10.2.6 Confirming Orders

Administrators or Customer Services must confirm submitted orders to progress the order to **Sent**.

⚠️SFTP enabled programs: When an order is Confirmed, the system transmits the order details to DHL via SFTP, using the SKU mix present at the moment of Confirmation.

🛠️ Steps To Confirm:
1. Open the order via the email link or go to **ORDERS** → **Waiting For Customer Service**.
2. Click **View** to review product details and delivery information.
3. Add dispatch notes, comments, PO number, order reference number etc.
4. If changes are made, click **Save Order Changes** and enter reason (recorded in the Order Adjustment Log, visible to all users).
5. **Download order form** to send to 3PL (before or after order is confirmed).
6. Click **Confirm Order**.
7. Status changes to **Sent;** next order is auto-generated.

10.2.7 Amending Sent Orders

Amending an order is often the fastest and least disruptive way to correct details - especially for changes to dosing, pricing, quantity, or delivery.

Who Can Amend and When?

Order Status	Who Can Cancel	Notes
Sent (latest order only)	Admins, Customer Service	In multi-product programs, the **last Sent order for each product** can be amended individually

⚠️ Once a new order has been submitted by the pharmacy, all previous **Sent** orders are locked and can no longer be modified. This safeguard ensures program rules remain accurate for the patient.

Editable Fields:
- Patient Weight
- Dosing Regimen
- SKU Quantity
- Unit Price (Paid programs only; free orders amendable only when **Special Conditions** are activated)
- Missing Product (Order 1 only)
- Delivery details
- Order Management details (including Purchase Order Number, Order Reference)

⚠️New SKUs cannot be added to a **Sent** dosing regimen. The only exception is weight-based dosing, where updating the patient's weight will automatically recalculate the required total dose. For all other cases, cancel the order and resubmit.

🛠️Steps To Amend:
1. Open the **Sent** order.
2. Edit as needed - calculations (e.g., quantities, price) update automatically but can be overridden.
3. Click **Save Order Changes**.
4. Enter reason and supporting details and click **Save Order Changes**.

What Happens After Amendment:
- The updated values are reflected in:
  - The order itself and order form
  - The patient's order history
  - Relevant reports

⚠️ For DHL sFTP programs, the amended order is *not* resent to DHL - any required action must be communicated to DHL separately.

10.2.8 Cancelling Orders

Cancelling an order should be a last resort. In most cases, it's faster and more efficient to amend an existing order (refer ***Section 10.2.7***), especially if changes involve dosing, price, quantity, or delivery details.

When to Cancel an Order:
- The order was submitted in error (e.g., not yet required).
- A fundamental change is needed that cannot be resolved through amendment.

⚠️If a patient withdraws from the program, cancel the Patient Request to automatically cancel linked orders.

Who Can Cancel and When:

Order Status	Who Can Cancel	Notes
Waiting for Customer Service	Pharmacy, Admins, Customer Service	
Sent (latest order only)	Admins, Customer Service	In multi-product programs, the **last Sent order for each product** can be cancelled individually

⚠️ Once a new order has been submitted by the pharmacy, all previous *Sent* orders are locked and cannot be cancelled. This safeguard ensures program rules (eg pricing, product limits) remain accurate for the patient.

🛠️Steps To Cancel:
1. Open the order.
2. At the bottom of the order click **Cancel Order.**
3. Enter a reason and supporting details.
4. Click **Cancel Order** again to confirm.

What Happens After Cancellation:

- The system regenerates the order using the *same* Order Number, but assigns a new Order ID.
  - Example: If Order 3 is cancelled, a new Order 3 is created, but with a different Order ID, so it is clearly distinguishable from the cancelled version.
- The regenerated order returns to its pre-submission state, ready for future placement.
- The cancelled order's product details are excluded from reports.
- The cancelled order remains visible in the portal and is clearly labelled with a **Cancelled** status.
- A permanent record of the cancelled order is retained in the patient's Order History table, including its original Order ID, product details, timestamps, and the cancellation reason. This ensures users can always differentiate between:
  - The cancelled order (original Order ID, status = Cancelled), and
  - The regenerated order (same Order Number, new Order ID).
- If the Patient Request was marked as Completed (e.g., due to Product Limit rules when the last order was submitted), cancelling the order will:
  - Automatically reopen the Patient Request as **Active**.
  - Regenerate the last order (same Order Number, new Order ID) for future placement.
- If the Sent order triggered a Clinical Benefit Assessment:
  - If the physician already completed the assessment, the system will not retrigger it.
  - If the physician had not completed it before cancellation, the system will retrigger the assessment when the threshold is met again.

⚠️ For DHL sFTP programs, the cancelled order is not deleted from the DHL file system - any required action must be communicated to DHL separately.

10.3 Actioning Clinical Benefit Assessments

Who can complete a clinical benefit assessment:

- Physician (primary responsibility).
- Administrators (if required)

🛠️Steps To Complete:

1. Go to **PATIENT REQUESTS** and find the relevant patient request.
2. Click **View**.
3. Complete the assessment pop-up and click **Submit**.

11 AMENDING ACTIVE PROGRAMS

⚠️Changes can affect patient requests, orders, and historical data. Review each procedure carefully.

11.1 Managing Program Details

Program-level settings that update everywhere the program appears.

Fields That Update Across All Requests and Orders
These updates apply immediately to all past and current patient requests, orders and reports:
- **Name**
- **Description**
- **Program Type**
- **Program Codes**

Country
- Adding a **Country** makes the program visible and selectable to physicians in that country.
- Removing a **Country** hides the program from physicians in that country.
- Existing requests and orders remain unaffected.

Program Start/End Dates
- Updates affect visibility for new patient requests only.
- Existing requests and orders remain unchanged.

Approver Type
- Changes apply to new requests only.
- Previously reviewed requests are not affected.
- If the **Approver Type** is changed, ensure the correct Approvers have been added / removed.

Pharmacy Management
- Changes apply to all patient requests.
  - New requests: follow the updated setting.
  - Existing active patients: retain their current nominated pharmacy until changed.
  - Orders in progress: continue under the originally assigned pharmacy unless updated.
- When changing from **Decentralised** to **Centralised**, add the required centralised pharmacies for selection on new patient requests (see ***Section 9.9***).

Minimum Patient Age
- Updates apply to new requests.
- Existing requests remain unaffected, unless amended.

Ordering Type
- Changes apply to all future orders.

Early Ordering Window
- Changes apply to all orders in **Waiting For Pharmacy** status.

Order Form Template
- Updates apply across all past and future orders.

11.2 Managing Indications

11.2.1 Adding an Indication

Makes the indication available on all new patient requests

🛠️To add an indication:
1. Create the indication (see ***Section 5.2***).
2. Link it to the required product dosing regimens (see ***Section 6.2***).
3. Activate it in the program for the relevant products and dosing regimens (see ***Section 9.2.4***).

11.2.2 Removing an Indication

Removes it from new patient requests.
Existing patients enrolled under that indication are not affected.

🛠️To remove an indication:
1. Go to the program's menu → **Initiation Product Setup** → **Edit** product.
2. Locate the relevant dosage and open the **Indications** dropdown.
3. Uncheck the indication to remove it.
4. Click **Submit** to save.

11.2.3 Editing an Indication

Name changes (see ***Section 5.2***) updates it everywhere it appears, including past and current patient requests and orders.

11.3 Managing Products

11.3.1 Adding a Product

Adding a product to a live program makes it available for new patient requests.
Existing requests and orders remain unchanged.
See ***Section 9.5*** for instructions.

11.3.2 Removing a Product

Removing a product from a live program immediately removes it from *all* patient orders — including **Sent** orders.

⚠️If a multi-product program includes a product that is no longer available for future use, it cannot be removed without impacting all past and present orders.

Required approach:
- Close the current program to new requests.
- Allow existing patients to continue ordering as usual.
- Create a new program without the discontinued product.
- Direct all future patient requests to the new program.

🛠️If removal is absolutely required:
- Go to the program's menu → **Initiation Product Setup**.

- Uncheck the Status checkbox in the table next to the product that is to be removed.

11.3.3 Removing a Speciality From A Product

If a Speciality should no longer apply to a program, it must be unlinked from the related product. This changes which physicians can see programs that use that product when creating new patient requests.

🛠️To remove a Speciality from a program:

1. Go to **PRODUCTS** → **View** → **Edit**.
2. Under **Product Speciality**, uncheck the Speciality to remove (ensure at least one speciality remains).
3. Click **Submit**. Program visibility updates immediately for physicians.

⚠️Multi-product programs: If any product in a program is linked to a Speciality, the entire program is visible to physicians associated with that Speciality, even if other products are not linked to it.

11.4 Managing Dosing Regimens

11.4.1 Editing Dosing Regimens

Changes to a dosing regimen's details (name, description, frequency, etc.) update instantly across all related patient requests and orders.

SKU changes (adding, removing, adjusting quantities) apply differently depending on the request/order status:

- New patient requests: updated immediately.
- Submitted patient requests: not applied.
- Orders in **Waiting For Pharmacy** Status: updated immediately.
- Orders in **Waiting For Customer Service** Status: not applied.
- **Sent** Orders: not updated.

⚠️ **Avoid editing dosing regimens in live programs.**
To preserve historical accuracy and maintain clean version control:

- Create a new dosing regimen when updates are required.
- Assign the new regimen to the program.
- Deactivate the old regimen once it is no longer needed.

🛠️ To update a SKU assignment (if required):
⚠️Before making any changes, confirm that no orders are in **Waiting For Customer Service** to avoid SKU inconsistencies.

1. Go to **PRODUCTS** → **View** the relevant Product.
2. Ensure the new SKU exists (add if required).
3. **Edit** the Dosing Regimen that requires an update.
4. Remove SKUs using the **Bin** icon.
5. Add new SKU from the dropdown.
6. Click **Submit** to save the change.

11.4.2 Adding New Dosing Regimens

See ***Section 6.4*** for creation steps, and ***Section 9.5*** for adding a new dosing regimen to a program.

11.4.3 Removing Dosing Regimens

- It is no longer available on new patient requests.
- It is removed from **Waiting for Pharmacy** orders.
  - For Fixed Order programs, where this dose is locked on patient orders:
    - Removing the regimen unlocks the dosing regimen field
    - The pharmacy can then select from the remaining active options
    - Once a new regimen is confirmed, the field locks again for future orders
- On orders in **Waiting for Customer Service**, the removed regimen appears with the text **(Unavailable)**, allowing Customer Service to update it to an active regimen before confirming the order.
- On **Sent** orders, the removed regimen displays the text **(Unavailable),** but does not impact reporting.

🛠️To Remove A Dosing Regimen

1. Click on the **Program** menu.
2. Locate the program and click **View**.
3. Go to **Initiation Product Setup** and/or **Order Variations**, depending on where the dosing regimen is being removed.
4. Click **Edit** on the product you want to adjust.
5. Click the **Bin** icon to delete the dosing regimen.
6. Click **Submit** to save.

11.5 Managing SKUs

Changing SKU attributes (such as name, description, codes, size, container type, or price) updates all patient requests and orders that reference that SKU. To maintain historical accuracy, do not edit an existing SKU if the change represents a new product version.

To avoid altering historical data:

- Create a new SKU with updated details (see ***Section 6.3***).
- Assign it to the appropriate dosing regimens (see ***Section 6.4***).
- Remove the outdated SKU from any dosing regimens where it is no longer required.

11.6 Managing Product Limits

Any change to a Product Limit affects all active patient requests immediately. The system uses the new limit for all future order calculations. **Completed** requests are not reopened if the limit is increased.

⚠️ Avoid editing existing product limits after a program is live. To preserve historical accuracy and maintain clean version control:

- Create a new product limit when updates are required (see ***Section 9.7***).
- Deactivate the old limit once no longer needed.

11.7 Managing Pricing Conditions

Pricing conditions determine how patient orders are evaluated for paid or free status. Changes to pricing conditions affect future orders only. **Sent** orders remain unchanged.

⚠️ You can make pricing changes after a program is live, but you should not edit an existing pricing condition. To preserve historical accuracy and maintain clean version control:

- Create a new condition (see ***Section 9.6***).
- Deactivate the old condition once no longer needed.

What Happens When a New Pricing Condition Is Applied
When a new pricing condition is added and the previous one deactivated, the system will:

- Recalculate each patient's payment position using the new rule.
- Their next order will follow the new pricing condition, it does not consider the previous one.
- The new pricing logic applies to future orders only.

This applies to all pricing condition types. Each structure has its own logic, and patients are repositioned accordingly.

Examples

1. Financial/Order Thresholds

- The patient is re-evaluated against the new threshold amount.
- If met → the next order will be free.
- If not met → the next order will be paid, even if under the old rule, the patient previously qualified as free.

2. Buy/Get Structures

- The patient is placed into the new cycle based on their current order number.
- Payments made under the old cycle are not considered.
- Example: If the new rule uses a 6-order cycle (1 paid + 5 free) and a patient is on order 7:
  - They start a new 6-order block.
  - They have not yet made a paid order in this block.
  - Their next order will be paid, regardless of what they have paid prior to this block.

11.8 Managing Clinical Benefit Rules

11.8.1 Editing rules in live programs

For historical accuracy and clean version control, avoid modifying Clinical Benefit (CB) rules in active programs. When updates are required:

1. Create a new rule (see ***Section 9.10***).
2. Then deactivate the old rule once no longer needed (see ***Section 11.8.3***).

What Happens When a Rule Is Updated:
Updating a CB rule immediately recalculates all active patients against the new criteria.

- Patients who now meet the updated threshold - A new CB assessment is triggered.
- Patients who no longer meet the updated threshold - Pending assessments are removed and the associated order is unlocked.
- Patients who have already completed that CB - Completed assessments remain valid, visible and are not retriggered, even if the rule is updated to occur at a later time point.

- Example:
  - Original rule triggers at Order 2.
  - Patient reaches Order 2 → CB is triggered and completed.
  - Rule is then *updated* to trigger at Order 6.
  - The patient is not assessed again because the CB was already completed under the previous rule.

Additional behaviours:
- Pending assessments will be cancelled if the patient no longer meets the updated criteria.
- Retrospective assessments triggered by a rule change do not send notification emails; notifications only occur when a patient crosses the threshold in real time.

11.8.2 Adding a new rule

Adding a new CB rule to an active program (see ***Section 9.10***) applies it immediately and retrospectively.
- The system reviews all active patients and applies the CB requirement to anyone who has already met the threshold
- Their current **Waiting For Pharmacy** order is locked until the physician completes the CB assessment.
- No email notifications are sent for retrospective triggers.
- The rule applies normally for all future patients who reach the threshold.

11.8.3 Deactivating a rule

Deactivating a rule removes it from all future assessments and program logic. Completed assessments remain visible and unchanged.

🛠️ To Deactivate A Rule:
1. In the program's menu, scroll to **Clinical Benefit**.
2. Locate the rule for removal and uncheck the **Status** box.
3. The rule is immediately removed from the program.

11.9 Managing Questions

11.9.1 Adding Questions

See ***Section 9.9*** to add questions to a program.

11.9.2 Removing Questions

Deactivating a question removes it from all new patient requests or orders, and also from all past submissions. The data remains visible on reports, but the question and its response no longer display in the portal.

🛠️ To Deactivate A Question:
1. In the program's menu, scroll to **Question Builder**.
2. Locate the question and uncheck the Status box
3. The question is immediately removed from display across all patient requests and orders.

11.9.3 Editing Questions

⚖️ Editing a question updates it everywhere, including past and current patient requests and orders. Any change immediately overwrites historical submissions. This can remove context from past records and affect audit readability.

When to Create a New Question (Recommended)
Create a new question (and deactivate the old one) when you want changes to apply only to future patient requests or orders. This keeps the original question intact for historical reporting, even though the old question no longer appears in the portal.

Create a new question instead of editing when:
- The meaning or intent of the question is changing.
- The wording needs to be updated or clarified.
- Dropdown options or answer formats are being revised.
- Required documents or instructions are being replaced.

Creating a new question ensures:
- Historical reports keep the original wording and context for past submissions.
- Future requests use the updated version without affecting previous records.

What Happens When You Edit Instead of Create New
Editing a question alters history. All past and current submissions update immediately. Examples:
- Changing **Text** - updates wording everywhere, including past submissions.
- Updating dropdown **Responses** - new submissions use the updated list; removed options disappear from past responses.
- Replacing uploaded documents - the new file replaces the old one everywhere.
- Renaming a question - removes existing responses in draft requests because the system treats the renamed item as a new question.

🛠️If Editting Is Required:
1. In the program's menu, scroll to **Question Builder** → **Edit** question.
2. Locate the question and amend the fields required.
3. Use the Live Question Editor to view changes.
4. Click **Submit** to save.

12 CLOSING PROGRAMS

12.1 Program Closure Options Overview

Program closure helps manage access and activity across patient enrollment and order workflows. Administrators can choose between two closure types depending on program needs:

Closure Type	Effect
Close to new enrollments	Prevents new patient enrollments. Existing patients can continue placing orders.
Complete program closure	Prevents new enrollments and cancels all existing orders immediately.

12.2 Closing To New Enrollments Only

🛠️ To restrict new enrollments while keeping the program active for existing patients:

1. Go to **PROGRAMS** → **View**.
2. Choose one of the following:
   - Change the **Status** from **Live** to **Inactive**, or
   - Use the calendar function to set a new End Date. Once the date is reached, the program automatically moves to **Completed**.

To confirm the closure, go to **Create Patient Request** and check the Programs dropdown. The program will no longer be available for selection.

⚠️ What Happens When a Program Is Closed to New Enrollments:

- Orders can continue to be placed for enrolled patients.
- Administrators retain access to inactive programs.
- Programs can be set back to Live and reactivated if new enrollments need to resume.

12.3 Complete Program Closure

Complete closure permanently disables a program and cancels all associated activity. This action should only be taken when the program has fully concluded and no further patient access or order processing is required.

🛠️To Completely Close A Program

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

⚠️ What Happens When a Program Is Closed

- All Patient Requests linked to the program are automatically updated to **Closed** status.
- All associated orders are cancelled.
- The program is permanently closed and cannot be reopened. This action is irreversible.

13 RESOURCES

13.1 Overview

Resources provide helpful content for all user types and are accessible via the top menu. Administrators can manage resources by adding, editing, or removing them.

- Resources can be restricted by country, allowing controlled access.
- They can be either links (URLs) or uploaded files.
- Resources are grouped under Group Headings (e.g., by program or specialty area) and displayed in a collapsible accordion format for easy navigation.

13.2 Adding Resources

1. Go to **RESOURCES** → **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.
    - Enter a new group name, or
    - Use an existing group name to add the resource under that heading
5. Select the **Countries** where the resource should be visible.
    - Only users registered to those countries will see the resource
    - Internal users can see all resources
6. Set **Status** to **Active** (visible to users) or **Inactive** (hidden from users).
7. Click **Submit** to save.

13.3 Editing Resources

1. Go to **RESOURCES** and locate the resource.
2. Click **View** → **Edit** to update:
    - **Name** of resource
    - **Group Heading**
    - **Type** (file or URL)
    - **Storage Document/URL Link**
    - **Country**
3. Click **Submit** to save.

13.4 Deactivating Resources

1. Go to **RESOURCES** and locate the resource.
2. Uncheck the **Status** checkbox.
3. The resource is deactivated and no longer visible to users.

14 REPORTS

14.1 Overview

Administrators have access to a catalogue of standard reports that provide visibility into program activity, ordering workflows, user accounts, and feedback trends. Reports can be run on demand, exported in Excel format, or scheduled for automated delivery to registered platform users. Standard Reports include:

Patient & Program Activity:
- Patient Request Report - Summary of all patient requests, including status, submission dates, and assigned users
- Program Eligibility Report - Overview of eligibility outcomes and related program criteria
- Patient Request Approvals Report - Tracks approval decisions, approvers, timestamps

Ordering & Fulfilment
- Orders Report - Details order submissions, status, product information, and associated patient requests

Account & Profile Reports
- Physician Report - Lists physician accounts, profile and institution details
- Pharmacy Report - Lists pharmacy accounts, profile details, and activity indicators

Feedback & Insights
- User Feedback Report - Includes feedback type, comments, timestamps, and user details

14.2 Running Reports

🛠️ To Run a Report:
1. Go to **REPORTS**
2. Select **Run Report** for the required report
3. Click **Export**
4. The report will download in Excel format

14.3 Scheduling Reports

Administrators can automate report delivery to registered platform users. Scheduled reports support daily, weekly, or monthly distribution and can be customised for timezone and format preferences.

How the Report Scheduler Works

- Flexible Scheduling: Choose daily, weekly, or monthly, preferred delivery time and timezone.
- Privacy Protected: Patient PII is automatically removed before sending (initials, DOB, and gender).
- Secure Distribution: Reports can only be sent to active, registered users.
- Delivery Formats: Excel attachments, rendered in the email (HTML), or both.
- Pause & Resume: Schedules can be paused (e.g., during holidays) and restarted at any time
- Action Logs: Each scheduled report includes a log showing delivery attempts, changes, and status updates.

- Easily Unsubscribe: Users can unsubscribe directly from the report email and Admins can manage recipient lists from the portal. If a user becomes inactive, they are automatically removed from all schedules.

🛠️ To Schedule a Report:

1. Go to **REPORTS** → **Schedule** the required report
2. Complete the scheduling form, including name, delivery format, frequency, timezone, and recipients.
3. Click **Submit** to activate the schedule.

🛠️ To Manage a Scheduled Report:

1. Go to **REPORTS.**
2. Scroll to **Scheduled Reports table.**
3. To delete a schedule, click the bin icon next to the report.
4. To view or edit a schedule:
    a. Click **View** to see schedule details (frequency, recipients, logs).
    b. Click **Edit** to update the schedule or change recipients, then click **Submit.**
5. To pause delivery, click **Pause Schedule** at the bottom of the screen. Restart it any time by clicking **Restart Schedule.**

🛠️ To View Scheduled Report Log:

1. Go to **REPORTS.**
2. Scroll to **Scheduled Reports** → **View** the report.
3. Scroll to **Schedule Logs** to view delivery history and activity.

15 NOTIFICATIONS & FEEDBACK

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

15.1 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.

15.2 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	✓	✓	✓	-	-

** By Program*
*** By Program and/or by Physician specialty*

15.3 Creating Notifications

🛠️ To Set Up a Notification:

1. Go to **NOTIFICATIONS** → **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; cycles restart from the 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**.

15.4 Updating/Deactivating Notifications

1. Go to **NOTIFICATIONS** → **View** on the notification.
2. 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.

15.5 Collecting User Feedback

Administrators can view 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 Practice

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

16 TROUBLESHOOTING AND FAQs

16.1 🔐 Login and Access

16.1.1 Physician cannot log in

- Go to **PHYSICIANS** → search for the physician's name.
- If not registered → guide them to register via the homepage.
- If registered and active → confirm they are using the correct email address.
- If email is correct → ask them to reset their password via Login page **Forgot password?**
- Administrators can also send a password reset via the **Send Forgotten Password Email** button in the physician's profile.

16.1.2 Pharmacy user cannot log in

- Go to **PHARMACIES** → search for the pharmacy.
- Confirm **Status** = **Active**.
- Click **View** → verify the user's email address is correct and active.
- If correct → direct them to reset password via **Forgot password?** (login page).
- Administrators can also send a password reset via **Send Forgotten Password Email** in the user's profile.
- If the email address is incorrect → update in the user profile under **View** → **Edit**.
- If the pharmacy isn't registered → add them via **PHARMACIES** → **Create**.

16.1.3 'Forgotten Password' email link not working

- Reset link expires after one hour. After this, the user must request a new password reset.
- Only the most recent reset link is valid; older links will not work.

16.1.4 "Invalid Token" error on login?

- The user is using an expired password reset link.
- Ask them to request a new reset and use only the latest email.

16.2 👤 Accounts, Profiles and User Management

16.2.1 A user's email address won't update

- The email address is already linked to another account (active, inactive, or rejected).
- To resolve this:
    - Search for the existing account using that email address.
    - Edit the email address on that account.
    - Apply the email address to the intended user.
- Once the email is freed, the update will save immediately.

16.2.2 Duplication error when adding a new pharmacy

A new pharmacy cannot be created if:

- Any 2 of Pharmacy Name, Street Address, and Suburb matches an existing pharmacy.
- The Primary Pharmacy User email is already used by another account.

16.2.3 Can a user have more than one role?

No. Each user can only be assigned one role.

16.2.4 Can a physician manage orders?

No. Physicians can submit patient requests but cannot place or manage orders.

16.3 🏥 Program and Patient Requests

16.3.1 Physician cannot see a program when creating a patient request

- The physician's Specialty doesn't match the program's Specialty.
- Update either the program's Specialty or the physician's profile.

16.3.2 Physician sees a '404 - Institution not found' error when creating a new patient request.

- Physician profile has no linked **Institution**.
- They (or Admins) must add on via their **Profile**.

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

- No, Pending Approval patient requests are locked to protect the integrity of the information submitted by the physician.
- Admins/Approvers must select **Request Revision** and return it to the physician to be updated.
- After approval, Administrators can amend limited details (not program/product selections).

16.3.4 Can patients be moved between programs?

No. Patients must be newly enrolled in the new program.

16.4 📦 Orders and Pharmacy Workflow

16.4.1 Pharmacy cannot find a patient

- Verify that the patient is Active.
- If active → check the nominated pharmacy in the patient request.
- If it doesn't match the inquiring pharmacy → Admins/Customer Service can update via **Select New Pharmacy** and click **UPDATE DETAILS**.

16.4.2 How to unlock a locked Order

- Orders unlock on their **Due Date/Unlock Date** (based on product supply frequency).
- Admins/Customer Service can unlock by: locate the patient order, click **View,** check the **Unlock Order** box, update Due Date, click **Submit** and enter a reason.

16.4.3 Sending orders to a different pharmacy delivery address

Pharmacies can add an **Alternative Delivery Address** in their **Profile** and select it when ordering.

16.4.4 Can a Sent order be amended?

Yes, but only the most recent Sent order for each product. Older Sent orders lock once a newer one is sent..

16.4.5 How order Due Dates are calculated

- Based on the product dosing regimen's **Frequency of Supply**.
- After an order is **Sent**, the system auto calculates the next due date.
- If an **Early Ordering Window** is set (in the Program), the next order unlocks early.

16.4.6 What does "Product Added To Order" mean?

- On Order 1 (only), pharmacies can add an additional product (if available in program).
- Customer Service is alerted with a red flag, **Product Added to Order**, to review before confirming.

16.4.7 Why does a dosing regimen show "(Unavailable)" on an order?

It appears when a dosing regimen was removed from the program after the order was created to indicate that the regimen is no longer available. Update it to an available dosing regimen.

16.5 📚 Resources

16.5.1 Why can't a physician or pharmacy see Resources?

- (Admins) Confirm the resource exists in **RESOURCES**.
- Ensure the resource status is **Active**.
- Ensure the resource is enabled for the user's country.

IMAGINE IF HEALTH

Email Address

jason@imagineifhealth.com
dana@imagineifhealth.com

Website

www.imagineifhealth.com