

# MedAdvisor App Quick Start Guide

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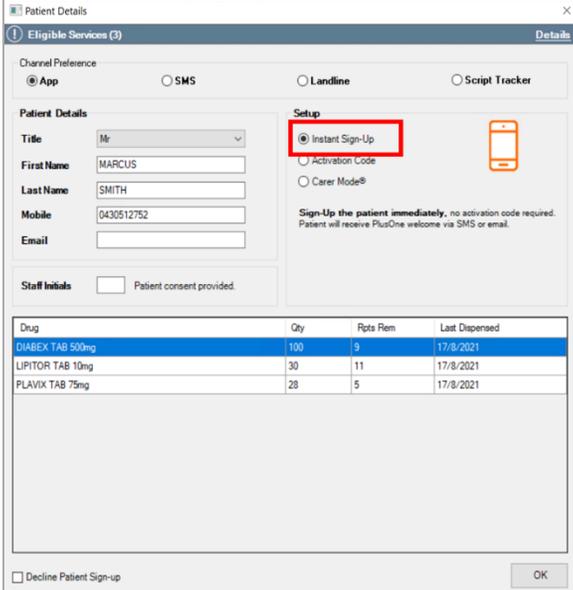
## 1. In-store Sign Up

1. Click **Sign up Customers** on the left hand menu of PlusOne
2. Select a recent customer OR search by customer name.
3. Under **Channel Preference**, select **App**
4. Choose your preferred option for customer sign up:

### Option 1: Instant Sign-Up (Recommended option)

This option sends customers a SMS/email with a link to verify their account. Use this method if you have discussed the App with the patient and captured their mobile number and/or email address.

1. Under **Set Up**, select **Instant Sign-Up**
2. Enter the customer's **mobile number and/or email address** and **staff initials** (to confirm consent)
3. Click **OK**



**Channel Preference**

App  SMS  Landline  Script Tracker

**Patient Details**

Title: Mr

First Name: MARCUS

Last Name: SMITH

Mobile: 0430512752

Email:

Staff Initials:  Patient consent provided.

**Setup**

Instant Sign-Up  Activation Code  Carer Mode®

Sign-Up the patient immediately, no activation code required. Patient will receive PlusOne welcome via SMS or email.

Drug	Qty	Rpts Rem	Last Dispensed
DIABEX TAB 500mg	100	9	17/8/2021
LIPITOR TAB 10mg	30	11	17/8/2021
PLAVIX TAB 75mg	28	5	17/8/2021

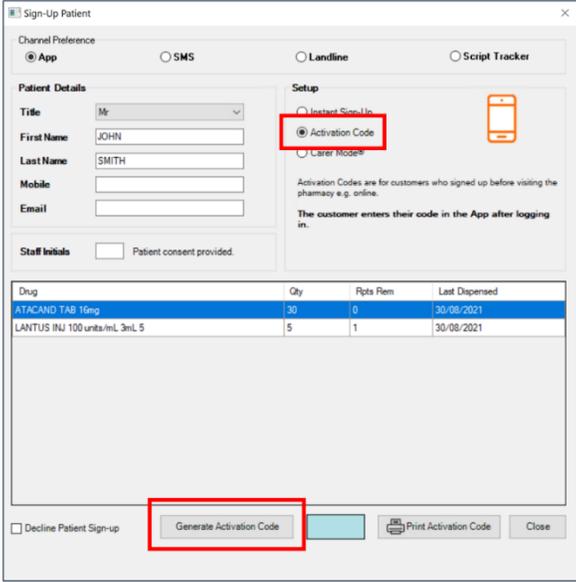
Decline Patient Sign-up

4. The customer will receive a SMS and/or email immediately with a link to **validate their account** and instructions to **download** the MedAdvisor App
5. Once they download the App, they will need to click **Log in** and enter their account details. Their medication list will appear within 24 hours.

## Option 2: Activation Code

This option provides the customer with a unique Activation Code that they can enter when registering as a new user after downloading the App. Use this method if you haven't obtained the customer's mobile number and/or email address, and want to recommend the App to the customer.

1. Under **Set Up**, select **Activation Code**
2. Enter your initials
3. Click **Generate Activation Code** at the bottom and code will appear in the blue box. You can **Print** this for the customer or write it on the flyer.



The screenshot shows the 'Sign-Up Patient' window with the following details:

- Channel Preference:**  App,  SMS,  Landline,  Script Tracker
- Patient Details:** Title: Mr, First Name: JOHN, Last Name: SMITH, Mobile: [empty], Email: [empty]
- Staff Initials:**  Patient consent provided.
- Setup:**  Instant Sign-Up,  Activation Code,  Later Mode
- Text:** Activation Codes are for customers who signed up before visiting the pharmacy e.g. online. The customer enters their code in the App after logging in.
- Table:**

Drug	Qty	Pkts Rem	Last Dispensed
ATACAND TAB 16mg	30	0	30/08/2021
LANTUS INJ 100 units/mL 3mL 5	5	1	30/08/2021
- Buttons:**  Decline Patient Sign-up,  (highlighted),  (with printer icon),

4. The customer will need to **download** the MedAdvisor App, click **Register**, and select **Yes** in the next screen when asked if they have an Activation Code
5. Once the customer has completed the registration process, their medication list will appear within 24 hours.

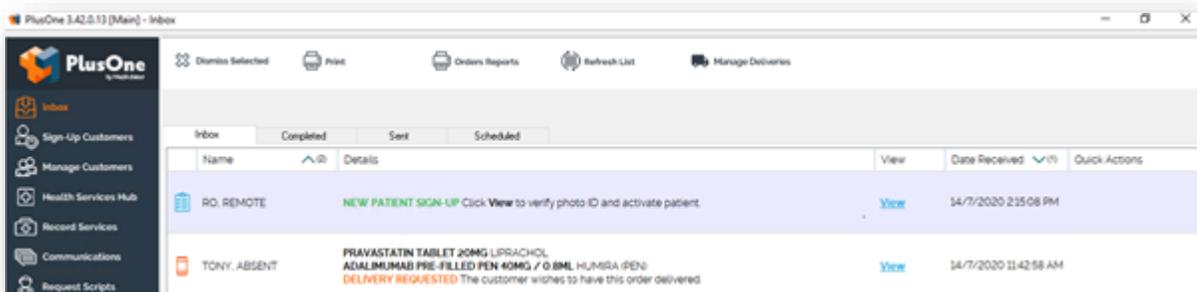
## 2. Remote Onboarding (customer verification)

Customers can sign up to the MedAdvisor App and order medications without needing to first visit the pharmacy (known as remote onboarding).

When a customer downloads the MedAdvisor App, they will **Register** for a new account. This involves a *customer verification* process to confirm their identity, which includes sending a photo of their **Medicare/DVA card** and **photo of themselves with their valid ID**.

Below are the steps to follow once a patient has completed the registration process and sent a verification request to your pharmacy

1. You will receive a **New Patient Sign Up** notification in the PlusOne Inbox

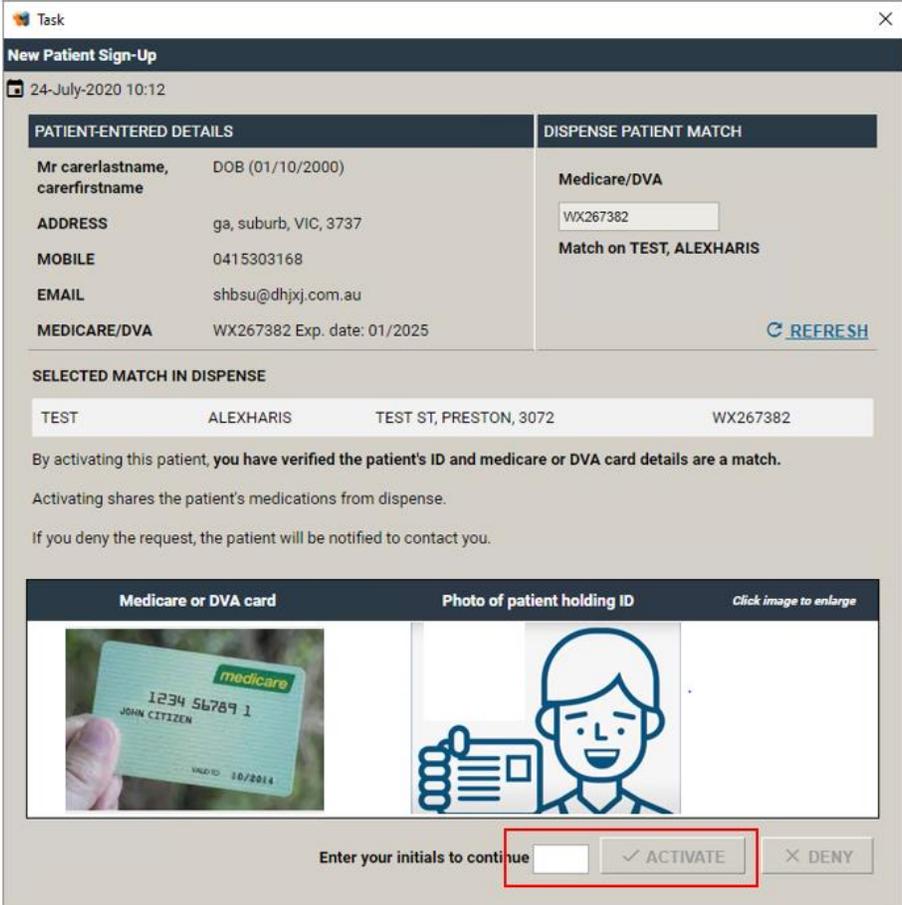


2. Click **View**
3. The new patient's details will be matched with their details in dispense, and you will be able to review the images they have provided for verification. You can choose to **Activate** or **Deny** the patient

Please note: the request to activate will expire in **5 days**. Please action these requests as soon as possible to provide a good customer experience.

### If there is a match with an existing patient in the dispense system

1. Enter your initials and select **Activate** when you have verified the patient's ID and Medicare/DVA card details are a match



**New Patient Sign-Up**

24-July-2020 10:12

PATIENT-ENTERED DETAILS		DISPENSE PATIENT MATCH	
Mr carerlastname, carerfirstname	DOB (01/10/2000)	Medicare/DVA	
ADDRESS	ga, suburb, VIC, 3737	WX267382	
MOBILE	0415303168	Match on TEST, ALEXHARIS	
EMAIL	shbsu@dhjxj.com.au		
MEDICARE/DVA	WX267382 Exp. date: 01/2025		<a href="#">REFRESH</a>

**SELECTED MATCH IN DISPENSE**

TEST	ALEXHARIS	TEST ST, PRESTON, 3072	WX267382

By activating this patient, **you have verified the patient's ID and medicare or DVA card details are a match.**

Activating shares the patient's medications from dispense.

If you deny the request, the patient will be notified to contact you.

Medicare or DVA card	Photo of patient holding ID	Click image to enlarge
		

Enter your initials to continue

### If there is a NO match with an existing patient in the dispense system

1. Create a new patient in your dispense software, and click **Refresh** on the New Patient Sign-Up dialogue box.
2. Enter your initials and click **Activate**

## If there are **MULTIPLE** matches with existing patients in the dispense system

1. Remove or merge duplicate patient entries in your dispense system to resolve the issue, and click **Refresh**.
2. Enter your initials and click **Activate**

## 3. Carer Mode

The Carer Mode capability allows a user to assist family members with their medication management by adding the cared for person's information to their MedAdvisor App account.

Carer Mode can be used for

- a parent managing their child's medication
- a spouse managing their partner's medication
- children with elderly parent(s), where the child is managing medication for the elderly parent(s)
- formal and informal carers that assist with medication management (outside of a family relationship)

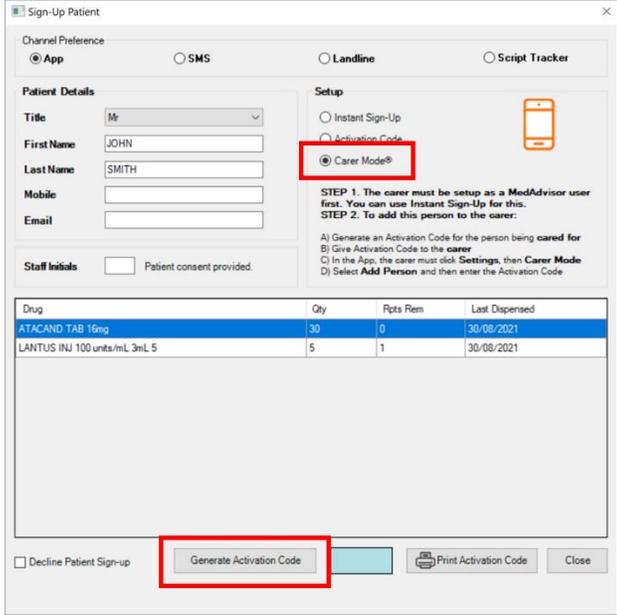
Carer Mode access is initiated by a pharmacist providing an activation code to the carer enabling access to the cared for person's medication information.

*Where pharmacists provide activation codes to carers, they must first confirm that necessary consents have been obtained from the cared for person.*

The steps below outline how to add a cared for person to an existing account holder (the "carer").

1. Click **Sign up Customers** on the left hand menu of PlusOne
2. Select a recent customer OR search by customer name.
3. Under **Channel Preference**, select **App**
4. Under **Set-up**, select **Carer Mode**

- Click **Generate Activation Code** at the bottom and code will appear in the blue box. You can **Print** this or write it on the flyer for the carer



Sign-Up Patient

Channel Preference  
 App  SMS  Landline  Script Tracker

Patient Details  
Title: Mr  
First Name: JOHN  
Last Name: SMITH  
Mobile:   
Email:   
Staff Initials:  Patient consent provided.

Setup  
 Instant Sign-Up  
 Activation Code  
 Carer Mode®

STEP 1. The carer must be setup as a MedAdvisor user first. You can use Instant Sign-Up for this.  
STEP 2. To add this person to the carer:  
A) Generate an Activation Code for the person being cared for  
B) Give Activation Code to the carer  
C) In the App, the carer must click Settings, then Carer Mode  
D) Select Add Person and then enter the Activation Code

Drug	Qty	Rpts Rem	Last Dispensed
ATACAND TAB 16mg	30	0	30/08/2021
LANTUS INJ 100 units/mL 3mL 5	5	1	30/08/2021

Decline Patient Sign-up

The Carer will now need to complete the set up of Carer Mode using the MedAdvisor App

- In the **MedAdvisor App**, the carer needs to navigate to **Settings** in the menu, and select **Carer Mode**
- Select **Add Person** and add the **Activation Code** for the cared for person. Their medication details will appear within 24 hours.

If 2 people in the family want to sign up to the App at the same time, with one person being the primary account holder and the other being under Carer Mode, a primary account must first be created (using either Instant Sign-Up or Activation Code method as described in part 1).

If both people already have a MedAdvisor account and one wants to be the carer of the other, please contact MedAdvisor support for assistance.

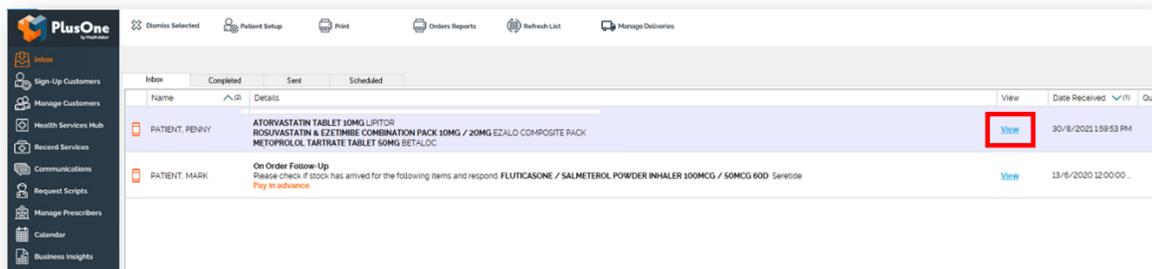
## 4. Processing orders

App orders can take one of many forms

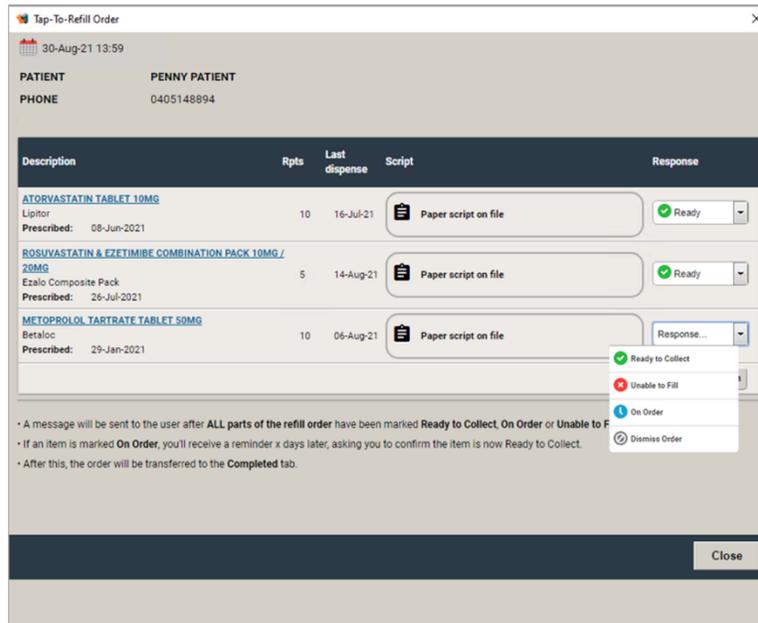
1. The customer will pay and collect in the pharmacy
2. The customer has chosen to pay in advance via the app and will collect in the pharmacy
3. The customer has chosen to pay in advance via the app and has requested delivery

### If the customer has selected to pay and collect in the pharmacy

1. When the order is received, a **pop-up notification** will appear on the bottom right hand side of your computer screen
2. Click on the pop-up or launch PlusOne. Click **Ready to Collect** under Quick Actions, or click **View** for a detailed view of the order

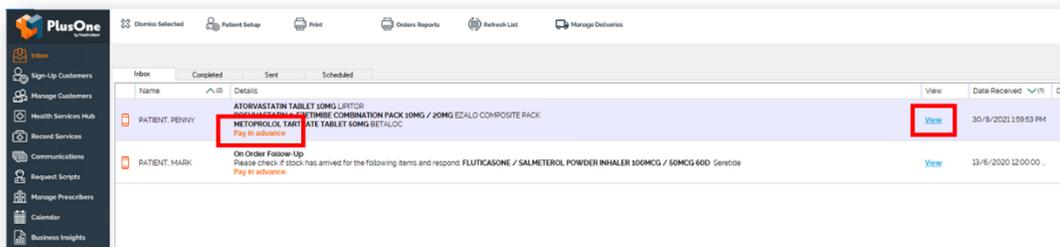


3. Dispense and prepare the items in the order.
4. Once dispensed, select a **Response** against each medication (Ready to collect, Unable to fill, On order or Dismiss Order).
5. The patient will receive a notification about their order eg Ready to collect



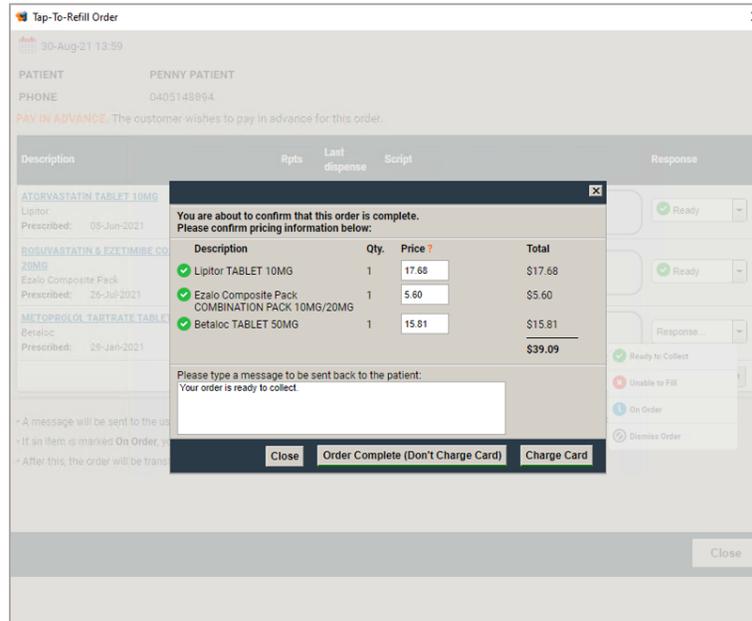
## If the customer has chosen to Pay in advance via the app and will collect in the pharmacy

1. The order in PlusOne will show as **Pay in advance**. Click **View**



2. In the order details screen, select a **Response** against each medication
3. A pop up box will appear. **Enter/confirm** the price for each medication and select **Charge Card**.

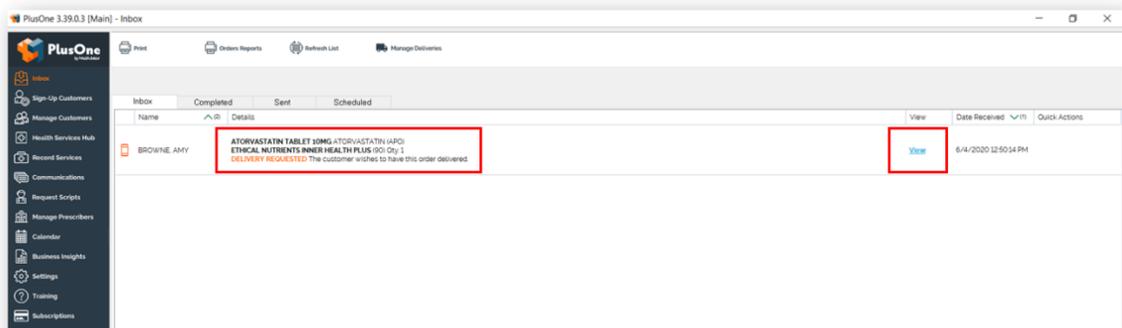
Note the price will be automatically populated with the last dispense price, however this may be from the previous time the medication was dispensed. Please make sure to confirm the price before charging card.



More information about Pay in advance here - <https://support.medadvisor.com.au/hc/en-us/articles/360024315893-Pay-In-Advance->

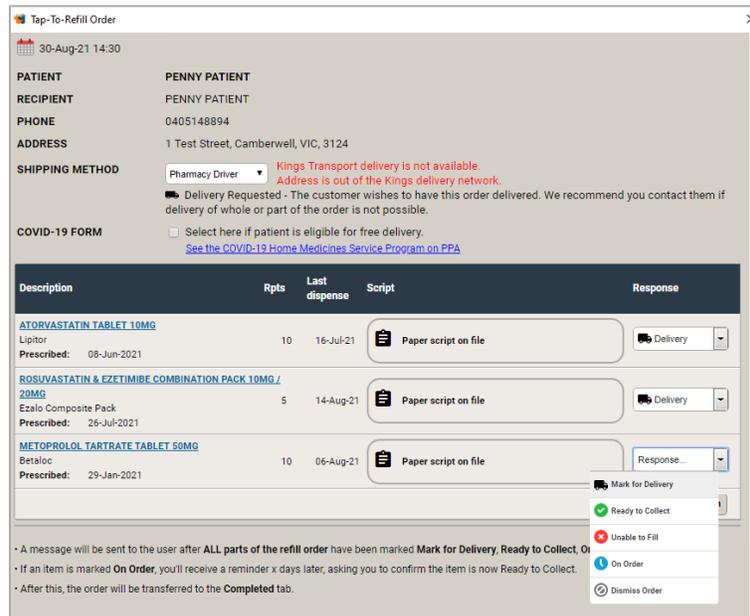
## The customer has chosen to Pay in advance via the app and has requested delivery

1. The order in PlusOne will show as **Delivery Requested**. Click **View**



2. In the order details screen, select **Shipping Method** (Pharmacy Driver, Kings Transport or AusPost)

- Under **Response**, select **Mark for Delivery** for the items that will be delivered



**Tap-To-Refill Order**  
30-Aug-21 14:30

**PATIENT** PENNY PATIENT  
**RECIPIENT** PENNY PATIENT  
**PHONE** 0405148894  
**ADDRESS** 1 Test Street, Camberwell, VIC, 3124  
**SHIPPING METHOD** Pharmacy Driver Kings Transport delivery is not available. Address is out of the Kings delivery network.

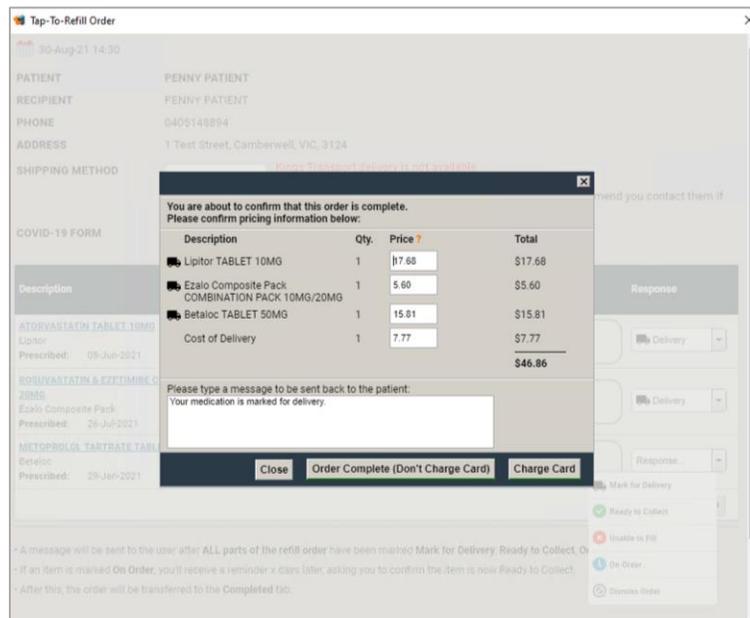
**COVID-19 FORM**  Select here if patient is eligible for free delivery.  
[See the COVID-19 Home Medicines Service Program on PPA](#)

Description	Rpts	Last dispense	Script	Response
<b>ATORVASTATIN TABLET 10MG</b> Lipitor Prescribed: 08-Jun-2021	10	16-Jul-21	Paper script on file	Delivery
<b>ROSUVASTATIN &amp; EZETIMIBE COMBINATION PACK 10MG / 20MG</b> Ezalo Composite Pack Prescribed: 26-Jul-2021	5	14-Aug-21	Paper script on file	Delivery
<b>METOPROLOL TARTRATE TABLET 50MG</b> Betaloc Prescribed: 29-Jan-2021	10	06-Aug-21	Paper script on file	Response...

Mark for Delivery  
 Ready to Collect  
 Unable to Fill  
 On Order  
 Dismiss Order

• A message will be sent to the user after **ALL** parts of the refill order have been marked **Mark for Delivery, Ready to Collect, On Order**.  
 • If an item is marked **On Order**, you'll receive a reminder x days later, asking you to confirm the item is now Ready to Collect.  
 • After this, the order will be transferred to the **Completed** tab.

- Enter the **price** for each medication and **Cost of Delivery** (if applicable), then select **Charge Card**



**Tap-To-Refill Order**  
30-Aug-21 14:30

**PATIENT** PENNY PATIENT  
**RECIPIENT** PENNY PATIENT  
**PHONE** 0405148894  
**ADDRESS** 1 Test Street, Camberwell, VIC, 3124  
**SHIPPING METHOD** Pharmacy Driver Kings Transport delivery is not available.

**COVID-19 FORM**  Select here if patient is eligible for free delivery.  
[See the COVID-19 Home Medicines Service Program on PPA](#)

Description	Qty.	Price	Total
Lipitor TABLET 10MG	1	\$17.68	\$17.68
Ezalo Composite Pack COMBINATION PACK 10MG/20MG	1	\$5.60	\$5.60
Betaloc TABLET 50MG	1	\$15.81	\$15.81
Cost of Delivery	1	\$7.77	\$7.77
			<b>\$46.86</b>

Please type a message to be sent back to the patient:  
Your medication is marked for delivery.

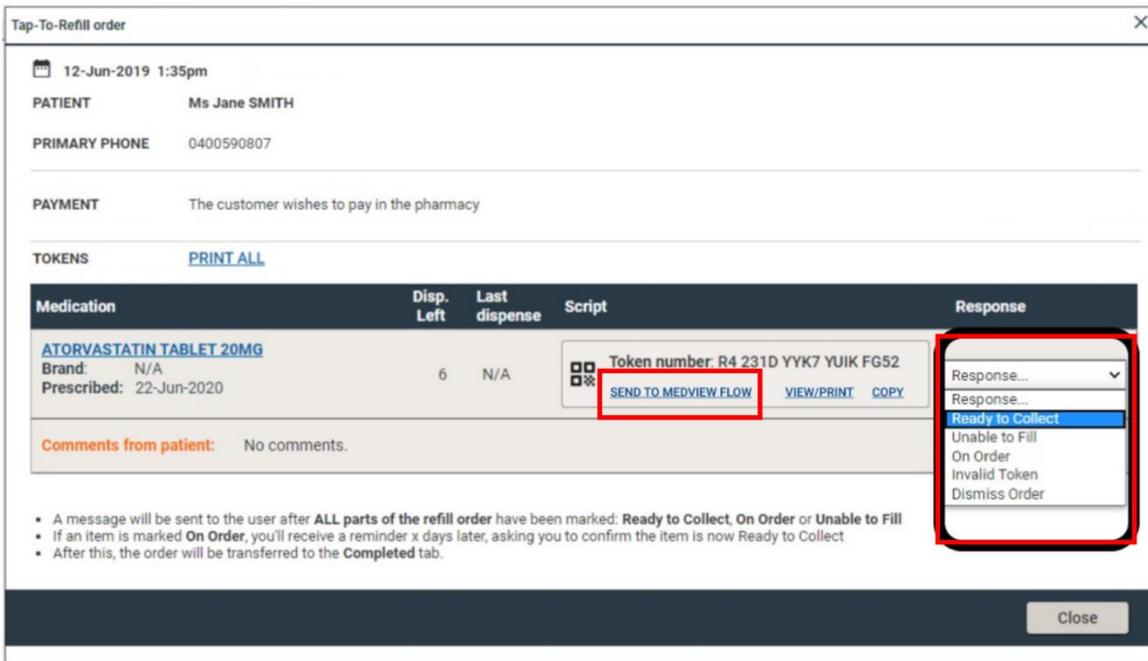
Mark for Delivery  
 Ready to Collect  
 Unable to Fill  
 On Order  
 Dismiss Order

• A message will be sent to the user after **ALL** parts of the refill order have been marked **Mark for Delivery, Ready to Collect, On Order**.  
 • If an item is marked **On Order**, you'll receive a reminder x days later, asking you to confirm the item is now Ready to Collect.  
 • After this, the order will be transferred to the **Completed** tab.

More information about delivery here - <https://support.medadvisor.com.au/hc/en-us/sections/360007904493-Delivery-Pharmacy->

## Processing orders with an eScript

1. If the customer orders an eScript via the MedAdvisor App, it will appear in the PlusOne inbox like any other app order
2. Click **View**
3. Click **Send to MedView Flow** or **Send to Dispense**
4. Select the appropriate **Response** from the dropdown menu (only once this has been completed will the customer be notified that their medication is ready to collect)



Tap-To-Refill order

12-Jun-2019 1:35pm

PATIENT Ms Jane SMITH

PRIMARY PHONE 0400590807

PAYMENT The customer wishes to pay in the pharmacy

TOKENS [PRINT ALL](#)

Medication	Disp. Left	Last dispense	Script	Response
<a href="#">ATORVASTATIN TABLET 20MG</a> Brand: N/A Prescribed: 22-Jun-2020	6	N/A	Token number: R4 231D YYK7 YUIK FG52 <a href="#">SEND TO MEDVIEW.FLOW</a> <a href="#">VIEW/PRINT</a> <a href="#">COPY</a>	Response... Response... <b>Ready to Collect</b> Unable to Fill On Order Invalid Token Dismiss Order

Comments from patient: No comments.

- A message will be sent to the user after **ALL parts of the refill order** have been marked: **Ready to Collect, On Order** or **Unable to Fill**
- If an item is marked **On Order**, you'll receive a reminder x days later, asking you to confirm the item is now Ready to Collect
- After this, the order will be transferred to the **Completed** tab.

Close

More information about eScripts here - <https://support.medadvisor.com.au/hc/en-us/sections/360009689534-E-prescribing->

## 5. Logging deferred scripts

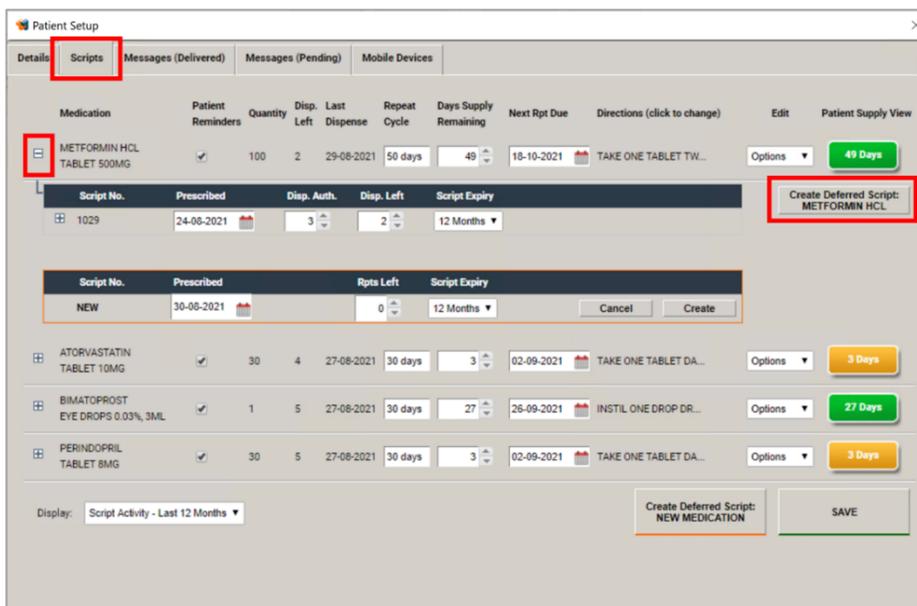
If a customer asks to leave a script on file that does NOT need to be dispensed immediately, log the deferred script in PlusOne so the total number of repeats available to the customer will be accurate

### Option 1 (Recommended option)

1. Log the deferred script in your dispense system – this will update the customer’s total number of repeats automatically

### Option 2

1. Go to **Manage Customers** in the left hand menu of PlusOne
2. Search for the customer and double click to launch the **Patient Setup** window
3. Under the **Scripts** tab, click **+** for the medication you would like to log a deferred script for.
4. Click **Create Deferred Script: [medication]** and enter the script details.
5. Click **Save**



The screenshot shows the 'Patient Setup' window with the 'Scripts' tab selected. The 'Scripts' tab is highlighted with a red box. Below the medication list, a red box highlights the 'Create Deferred Script: METFORMIN HCL' button. The medication list includes:

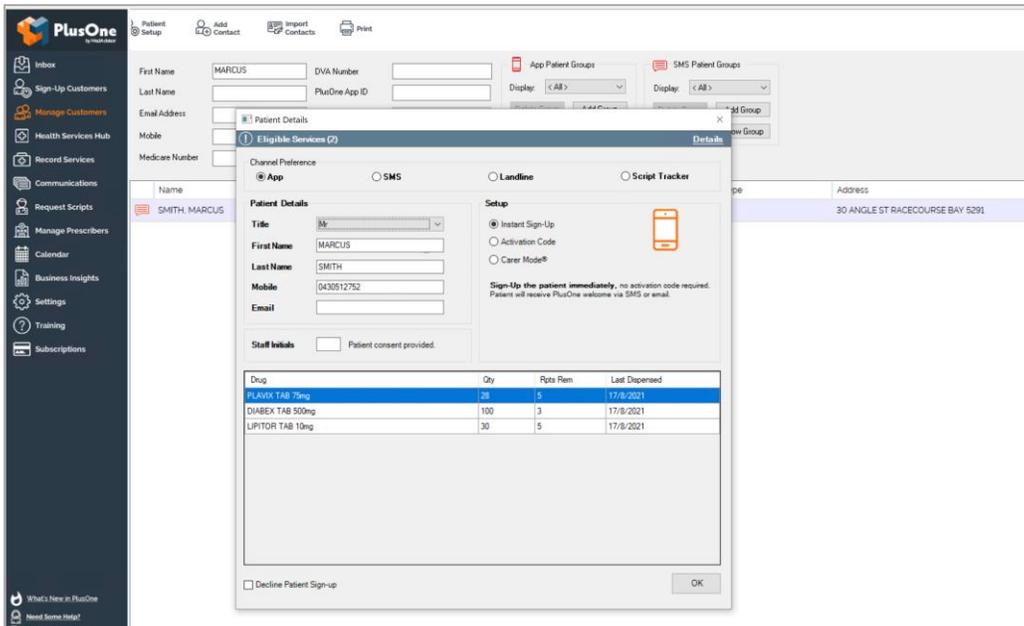
Medication	Patient Reminders	Quantity	Disp. Left	Last Dispense	Repeat Cycle	Days Supply Remaining	Next Rpt Due	Directions (click to change)	Edit	Patient Supply View												
METFORMIN HCL TABLET 500MG	<input checked="" type="checkbox"/>	100	2	29-08-2021	50 days	49	18-10-2021	TAKE ONE TABLET TW...	Options	49 Days												
<table border="1"> <thead> <tr> <th>Script No.</th> <th>Prescribed</th> <th>Disp. Auth.</th> <th>Disp. Left</th> <th>Script Expiry</th> <th></th> </tr> </thead> <tbody> <tr> <td>1029</td> <td>24-08-2021</td> <td>3</td> <td>2</td> <td>12 Months</td> <td></td> </tr> </tbody> </table>											Script No.	Prescribed	Disp. Auth.	Disp. Left	Script Expiry		1029	24-08-2021	3	2	12 Months	
Script No.	Prescribed	Disp. Auth.	Disp. Left	Script Expiry																		
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<table border="1"> <thead> <tr> <th>Script No.</th> <th>Prescribed</th> <th>Rpts Left</th> <th>Script Expiry</th> <th></th> </tr> </thead> <tbody> <tr> <td>NEW</td> <td>30-08-2021</td> <td>0</td> <td>12 Months</td> <td>Cancel Create</td> </tr> </tbody> </table>											Script No.	Prescribed	Rpts Left	Script Expiry		NEW	30-08-2021	0	12 Months	Cancel Create		
Script No.	Prescribed	Rpts Left	Script Expiry																			
NEW	30-08-2021	0	12 Months	Cancel Create																		
ATORVASTATIN TABLET 10MG	<input checked="" type="checkbox"/>	30	4	27-08-2021	30 days	3	02-09-2021	TAKE ONE TABLET DA...	Options	3 Days												
BIMATOPROST EYE DROPS 0.03%, 3ML	<input checked="" type="checkbox"/>	1	5	27-08-2021	30 days	27	26-09-2021	INSTIL ONE DROP DR...	Options	27 Days												
PERINDOPRIL TABLET 8MG	<input checked="" type="checkbox"/>	30	5	27-08-2021	30 days	3	02-09-2021	TAKE ONE TABLET DA...	Options	3 Days												

At the bottom of the window, there is a 'Display:' dropdown set to 'Script Activity - Last 12 Months', a 'Create Deferred Script: NEW MEDICATION' button, and a 'SAVE' button.

## 6. Upgrade SMS customers to the App

Signing up customers to the App has many benefits, including a better user experience for the customer and no SMS costs for the pharmacy.

1. Go to **Manage Customers** in the left hand menu of PlusOne
2. Search for the customer who you want to upgrade to the App
3. Under Channel Preferences, select **App** instead of SMS
4. Under Set Up select **Instant Sign-Up**, enter **Staff Initials** and click **OK**.



The screenshot shows the PlusOne software interface. A dialog box titled "Channel Preference" is open, showing options for "App", "SMS", "Landline", and "Script Tracker". The "App" option is selected. Under the "Setup" section, "Instant Sign-Up" is selected, and "Patient consent provided" is unchecked. A table of medications is visible at the bottom of the dialog box.

Drug	Qty	Pkts Rem	Last Dispensed
PLAWX TAB 75mg	28	15	17/8/2021
DIABEX TAB 500mg	100	3	17/8/2021
LIPITOR TAB 10mg	30	5	17/8/2021

## **8. Frequently asked questions**

### **What happens if a patient forgets their MedAdvisor App password?**

The customer can select "Forgot Password?" on the login screen of the App OR You can assist the customer to reset their password using **PlusOne**. Go to PlusOne > Manage Customers > Search for the customer > Select the customer > Details tab > Reset Password

### **How do I update the opening hours for my pharmacy?**

Go to PlusOne > Settings > App settings > Display opening hours

### **How do I turn on Pay in advance**

Go to PlusOne > Subscriptions > Pay in Advance – enable and set remittance details > tick Enable and enter account details

### **How do I turn on Delivery**

Go to PlusOne > Subscriptions > Delivery – set and enable options > tick Enable and enter your delivery preferences

### **How do I adjust the timing or position of the pop up notifications**

Go to PlusOne > Settings > Notification Options