ONBOARDING CHECKLIST - ADMIN

Track Your Progress

Use this checklist to track your progress as you complete each module in this Onboarding Guide. Use the QR codes for more detailed instructions for the given task.

- ☐ Getting Started - Admin
- ☐ Web Portal Basics
- ☐ Tasks
  - ☐ **Complete medical billing sheet**[1]
  - ☐ **Add users**[2]
  - ☐ **Add pricing**[3]
  - ☐ Update PMS information
- ☐ App Basics
- ☐ Medical Billing
- ☐ Workflows

GETTING STARTED - ADMIN

Welcome to Workflow Services. Our mission is to increase pharmacies' revenues by allowing them to offer more services to their communities, document their encounters digitally in a compliant way, and maximize reimbursement from these encounters. We do this by supplying our customers with clinical workflows and simplifying the medical claim submission and revenue cycle management processes.

Getting started with Workflow Services

You will access Workflow Services software in two places:

1. The **Workflow Services web portal** is accessed via the web browser, typically on a computer, and serves as your admin center. You will use the Workflow Services web portal to make updates to your profile, add users, find patient registration links, follow claims, and much more.

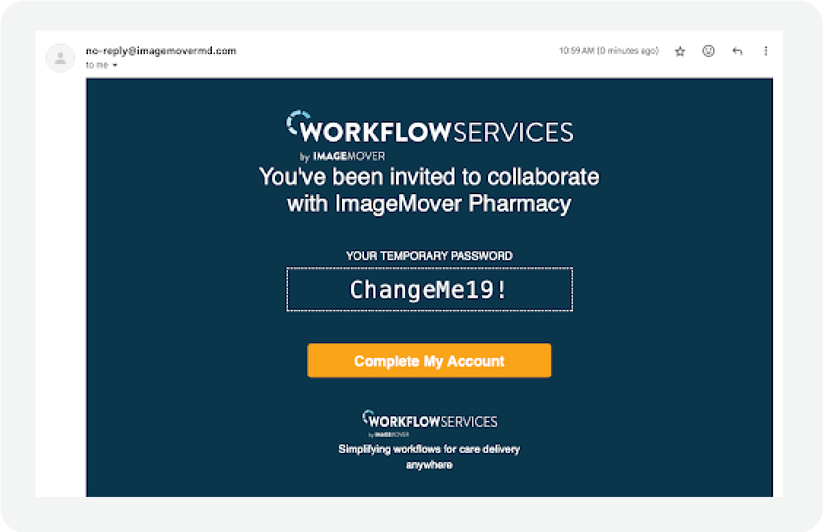
2. The **Workflow Services mobile app** is optimized for access via a tablet or other supported mobile device and it's the tool pharmacy staff will use to access workflows. While the clinical workflows are optimized for mobile use, If you have a computer in your clinical services area workflows can also be accessed via a browser though we highly recommend investing in a tablet or two for an optimal experience.

Use the following steps to get set up in the web portal and with the mobile app right now.
If you need assistance at any time send an email to support@imagemovermd.com.

Workflow Services Web Portal - Getting Started

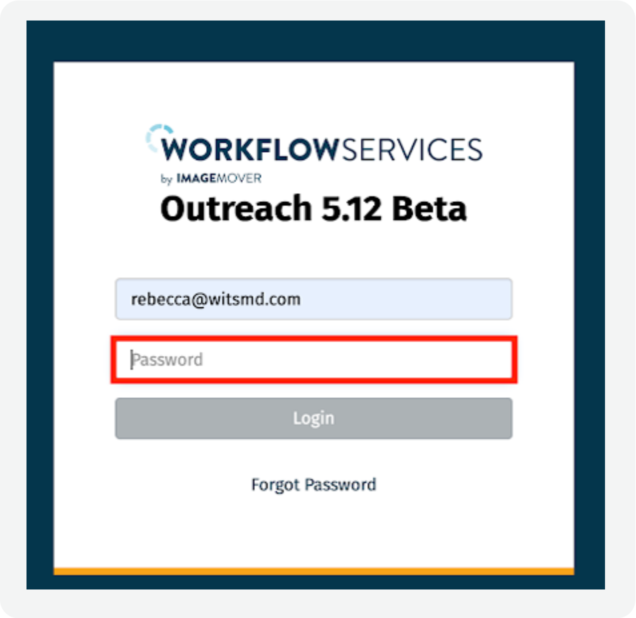
The web portal is where you will go to add users, make updates to the services you offer, check insurance claims, etc. You will receive an email with instructions for logging in for the first time.

1. Start with the email from **no-reply@imagemovermd.com.**

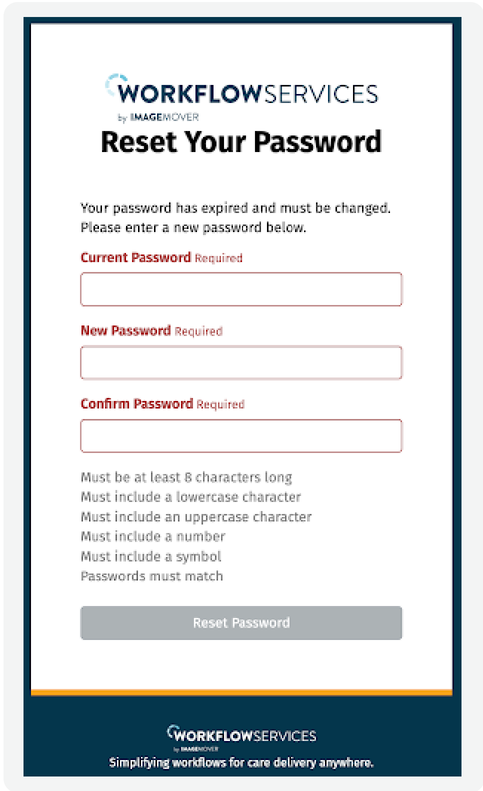


2. Click “Complete My Account”

3. Enter your email address and temporary password found in your welcome email. Make sure to copy the exclamation mark - it’s part of the password.



4. You will be prompted to change your password. Choose one you will remember, as you will use this to sign in to the web portal and mobile application.



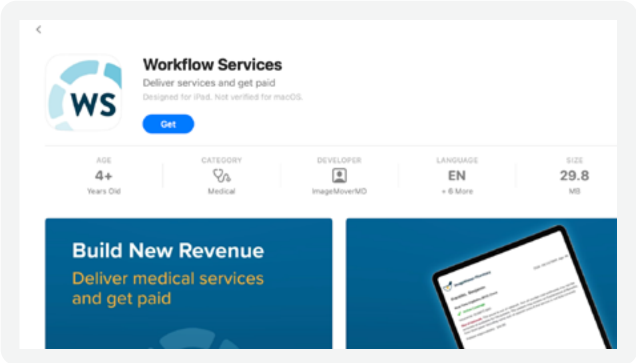
You are now set up in the web portal! Leave the web portal up in your browser. You'll need to access it as we set up your app in the following section.

Workflow Services App - Getting Started

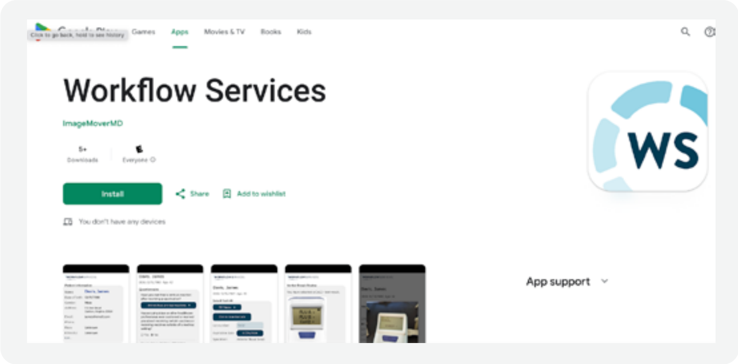
Setting up the Workflow Services app on your mobile device (a tablet is the recommended device)

1. Download and install the app: Find the Workflow Services app in your app store and download it to your device.

App Store Listing: https://apps.apple.com/us/app/workflow-services/id6480122416

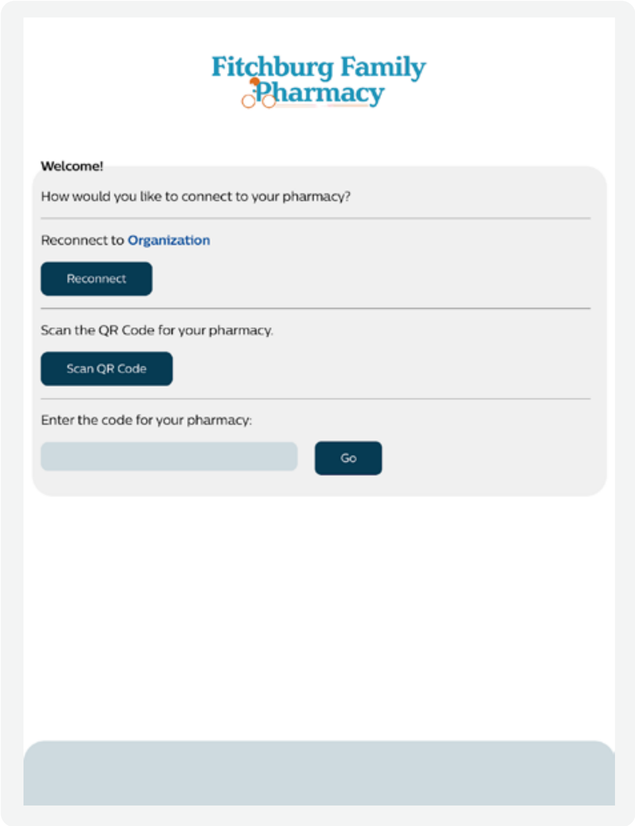


Play Store Listing: https://play.google.com/store/apps/details?id=com.imagemovermd.ws



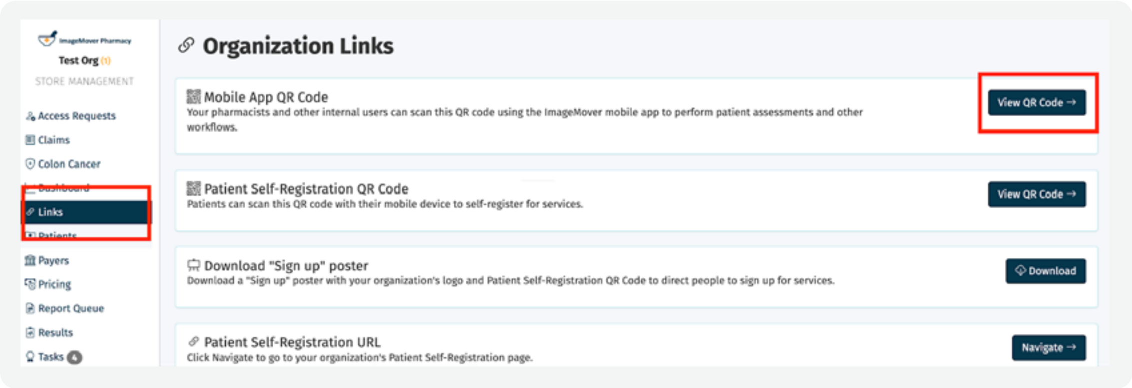
2. Open the app: Tap on the app icon to launch it.

3. Select that you would like to **Scan QR Code** and pause for a moment while you go login to the Web Portal from your desktop device.



4. You will need to "tell" the Workflow Services mobile application which account you're trying to access. This is done through scanning a QR Code found in the web portal.

You can find this QR code by logging into the web portal, and selecting the Links tab on the left side of the screen.



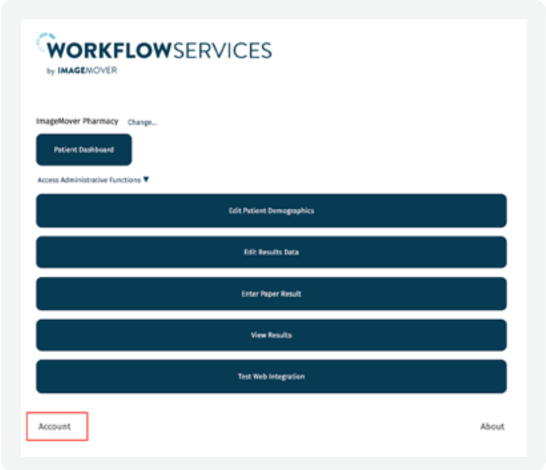
5. Select "View QR Code" from the Mobile App QR Code selection row.

6. While in the Workflow Services app on your tablet (not your device's camera app), scan the QR code. To scan a QR code with your tablet, hold the back side of your tablet up so the camera (usually in the upper right hand corner of the tablet) can see the QR on your computer screen. The device should automatically select and process the QR code. If it doesn't, try repositioning your tablet so it can clearly read the QR code.

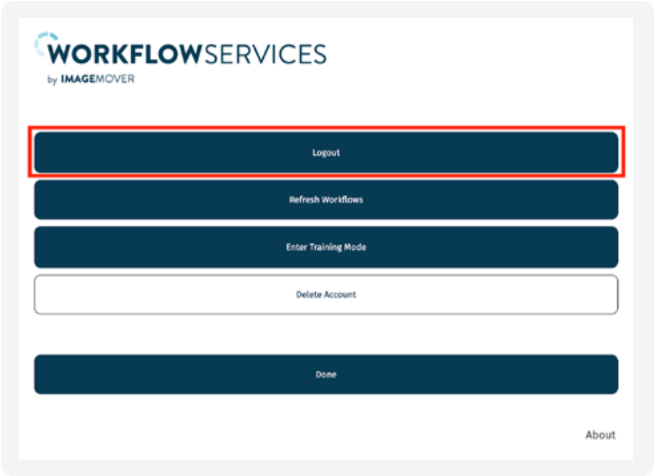
   You should only need to use this QR code one time per mobile device. Once your environment is set, it will stay configured until you delete the mobile app from the device or manually exit the environment.

7. **Login:** Use the username and password you chose during your account creation. This is the same no matter where you login to Workflow Services.

8. **Logout:** Take some time to look around in the app and then logout by following these steps:
   - Select Account in the lower lefthand corner of the home page



- Select Logout



Great job completing the Getting Started Admin portion of your training.
Add a checkmark to your Onboarding Checklist and go on to your next step.

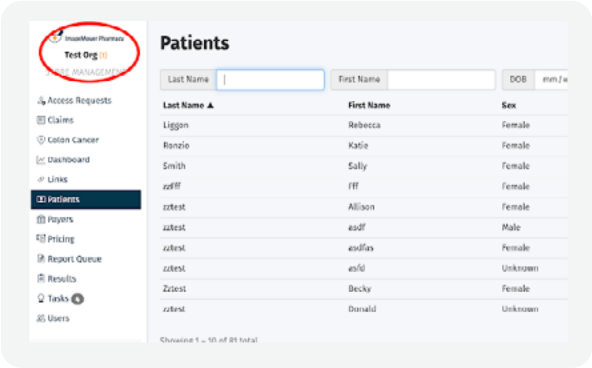
WEB PORTAL BASICS

The Workflow Services web portal is the administrative command center for your platform. The web portal is where you will go to adjust settings that control the Workflow Services Mobile App, add users, check insurance claims, and other administrative functions. Your administrator will give you access appropriate for your role.

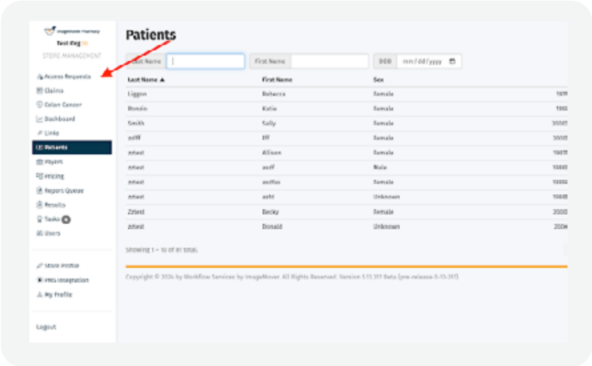
Navigating within the Web Portal

Let's take a look at the web portal, learn how to make updates, and how to find the information you are looking for.

1. Start by logging into your pharmacy's web portal (if you're not sure how, review Welcome to Workflow Services - Setup Guide.) Once logged in, you should see your pharmacy's name and logo in the upper left corner. If you don't see your pharmacy name and logo there, reach out and let us know at **support@imagemovermd.com**.

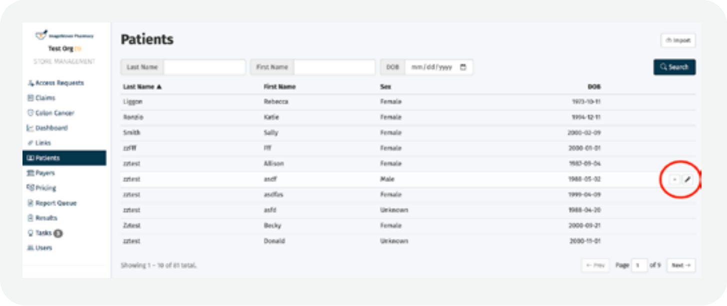


2. Beneath the store name and logo, notice the menu on the left side of the screen. Move around the web portal by clicking on any of these menu options.

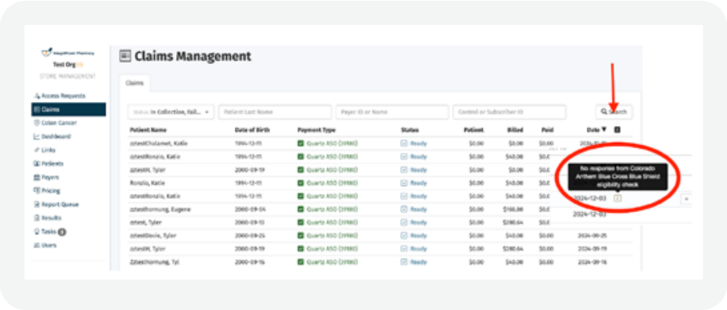


Take some time to click on the different menu options to see what they do.

3. Discover what you can do on each page by hovering over a row and looking to the far right of that row. If icons appear, that means there are actions you can take from this screen as shown below on the Patient page.



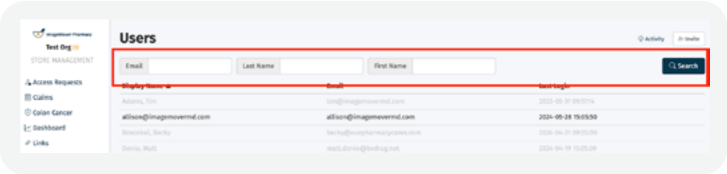
4. Or, there may be more information available to you, as shown below on the Claims page.



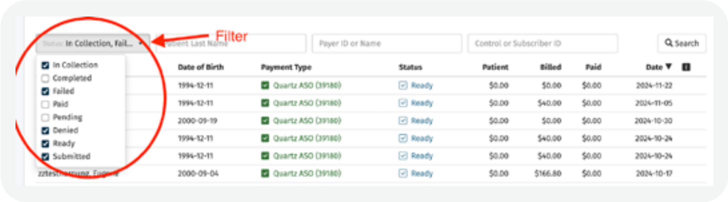
Here is a list of the icons you may encounter in the web portal and what they mean:

- Edit. Click on this to make changes in the web portal.
- Delete. Click on this to remove something. (There is no way to undo this action once taken.)
- Date Picker. Click on this to select a specific date.
- Add. Click on this to add information.
- Discover. Click on this to search for specific information.
- Information. Hover over this icon to see details or tips on that feature.

5. Some pages allow you to search for something/someone specific. When this is an option, enter information in at least one text field and click ‘Search’.



6. Some views will also have a multi-select picklist filter which you can use to further refine your search.



Amazing! You completed the Web Portal Basics portion of your training.
Add a checkmark to your learning timeline and go on to your next step.

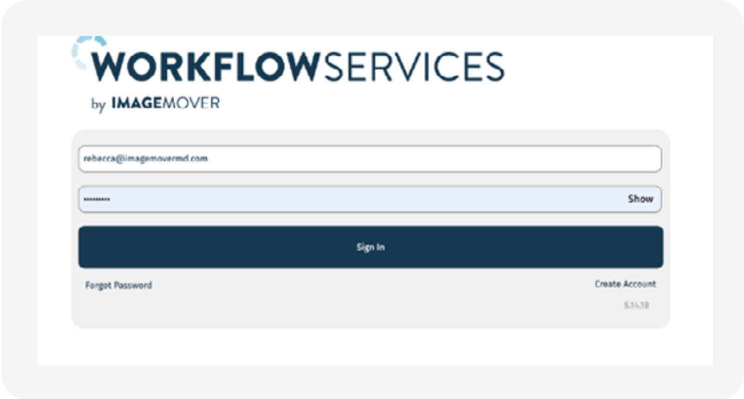
WORKFLOW SERVICES APP BASICS

The Workflow Services app is where you will interact with the clinical workflows. You can access the app on a tablet (recommended), a mobile phone, or via the desktop workflows.

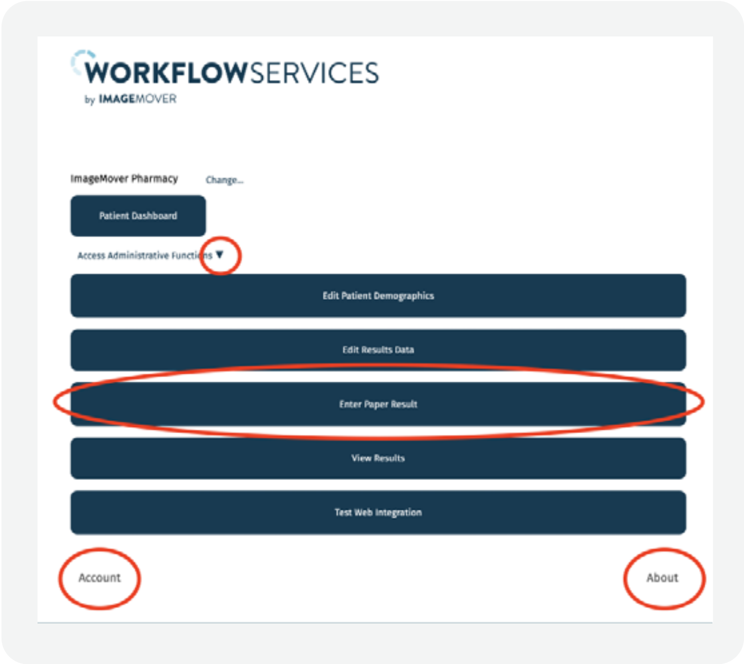
Using the App

1. Launch the app by clicking on the Workflow Services icon from your tablet's Homepage or by going to the desktop workflows URL. (Please note that some of your screens may look different from the ones in this tutorial depending on what services your pharmacy offers and how your system is set up.)

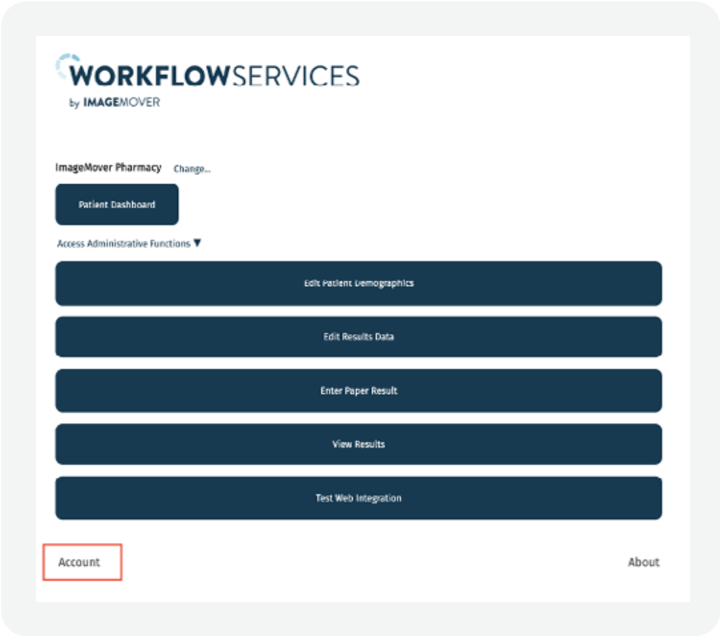
   Log in using your user name and password - your user name and password are the same throughout Workflow Services.



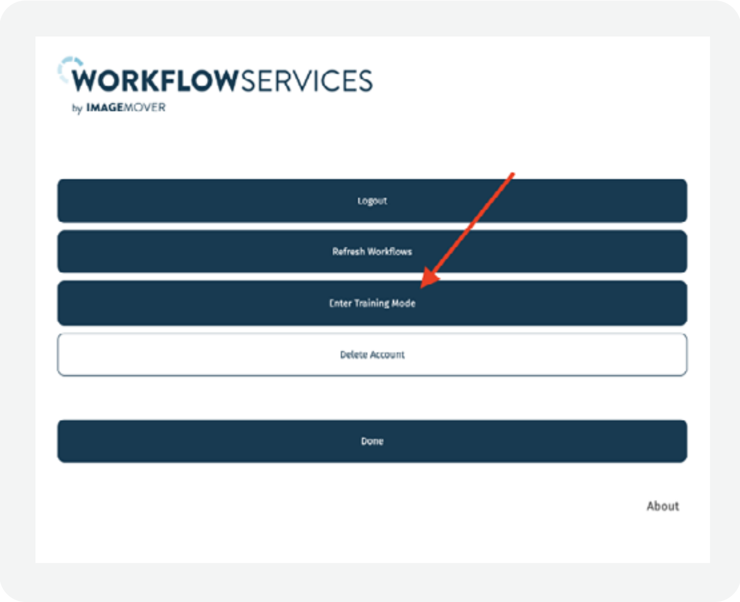
2. You will be brought to a home page with several options. Note there are a few different areas to click on:
   a. The downward pointing arrow
   b. Navy rectangles
   c. The text at the bottom of the screen



3. Select **Account** to begin.

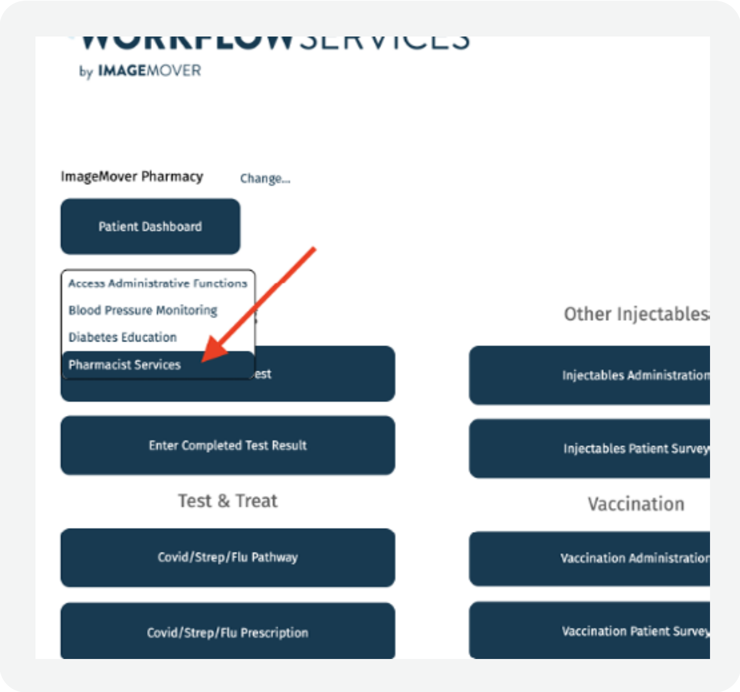


4. Select **Enter Training Mode**. Working in training mode will allow you to look around without impacting any real data. A banner will appear at the top of the screen to remind you that you are in training mode.



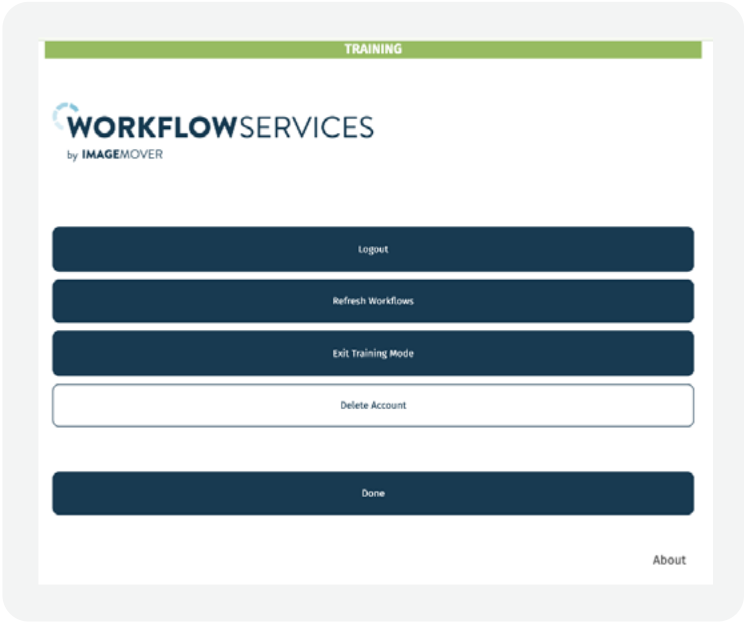
5. Select **Done** to return to the home screen.

6. To find pharmacy workflows select **Pharmacist Services** after clicking on the down arrow.

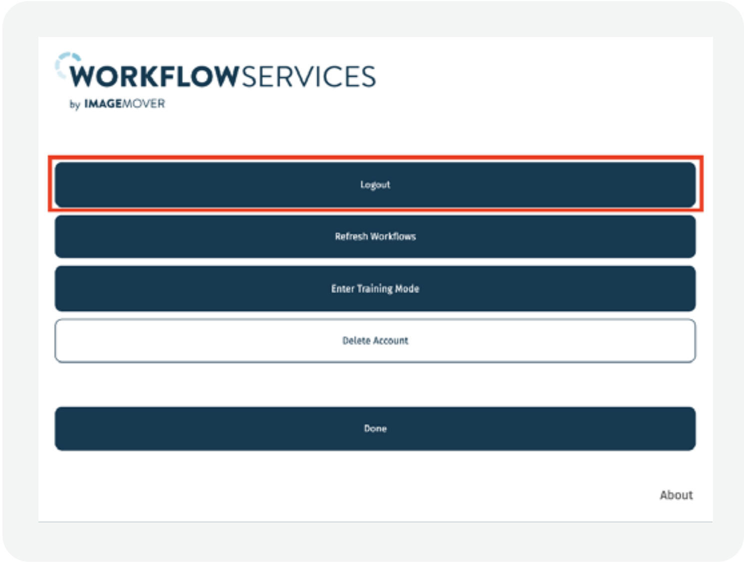


Take some time to click on the different menu options to see what they do.
You will spend more time looking at workflows in a later module.

7. When you are done select Account from the bottom left of the home screen to Exit training mode.



8. Then **Logout** to logout. **You will want to log out of the app each time you are done using it.**



You're a superstar! You completed the App Basics portion of your training.
Add a checkmark to your Onboarding Checklist and go on to your next step.

MEDICAL BILLING

Medical billing presents pharmacies with a valuable opportunity to generate additional revenue by optimizing existing services and expanding into new clinical offerings. The specific steps required to begin billing are complex and they can vary depending on the payers you choose to work with. Our Customer Success and Enrollment teams will guide and support you through this process.

To get started billing medical claims through Workflow Services complete the steps below.

Step 01 (Complete ASAP)

1. Complete and submit the Medical Billing Information sheet. This sheet can be found in your <Workflow Services Next Steps - 'Pharmacy Name'> email or at this URL **here.**

Step 02 (Complete ASAP within 3 months of your "go-live" date)

1. You need a Type 2 NPI that will be used for, and ONLY for your medical claims. If you have a type 2 NPI that you do not use to submit any claims for the pharmacy you can use that OR create a NEW TYPE 2 NPI **here**.

   - We recommend associating these taxonomy codes with your new Type 2 NPI: 261QP2300X (Clinic/Center Primary Care) 261QH0100X (Clinic/Health Center - Health Services) 207Q00000X (Family Medicine)

Please note: for customers with multiple locations all which share one TIN, only ONE new Type 2 NPI is needed. If each location has its own TIN, each location will need a new Type 2 NPI.

2. Associate your Medical Billing Type 2 NPI with a Medicaid group number by submitting a new Medicaid application. (This is necessary even if you have been enrolled as a provider in Medicaid previously.)

   - Use the primary taxonomy code associated with your new Type 2 NPI for this Medicaid account. (The Medicaid taxonomy code MUST match the primary taxonomy code associate with your new Type 2 NPI.)

   - Associate all providers at your location with this new Medicaid ID.

3. Update existing Commercial Payer Contracts by adding your new Type 2 NPI as an additional NPI.

4. Include the Type 2 NPI dedicated to Workflow Services when getting any new commercial payer contracts. (If Workflow Services is managing your credentialing process, we'll take care of this step for you.)

   If this is not completed within 3 months of your go-live date, medical billing will be disabled on your account.

Step 03

1. Alert your Workflow Services Customer Success Manager when Step 2 is complete.

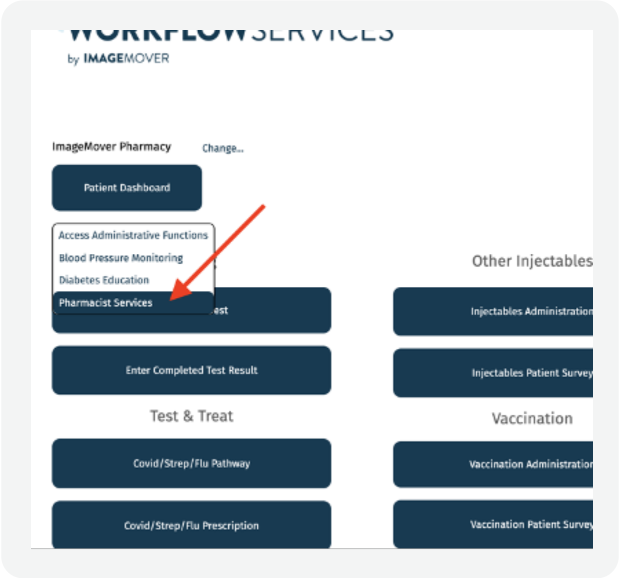
2. Mark your calendars for any important dates such as contract reviews or renewals.

Amazing! You've completed the Medical Billing portion of your onboarding.
Add a checkmark to your Onboarding Checklist and go on to your next step.

INTRO TO WORKFLOWS

Workflows are the tools you will use to digitize pharmacy encounters and create medical claims. You can access the workflows from a tablet using the Workflow Services app (preferred and recommended) or from the desktop workflows.

1. Once you are logged into the app or desktop workflows you can find the workflows that are available to your pharmacy by selecting **Pharmacist Services** from the drop down menu on the home screen.

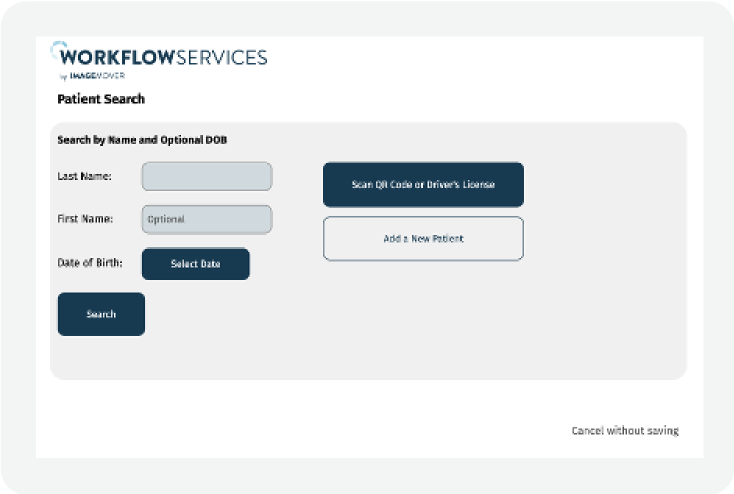


Once selected, the workflows will appear on your screen organized in their respective categories.

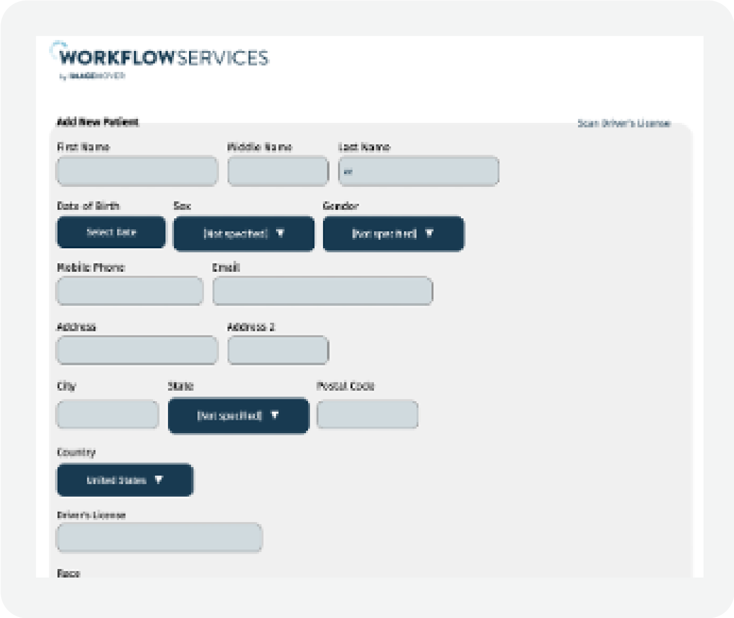
2. Click on any of the workflows and you will be brought to the **Patient Search** screen.

There are 3 ways to search for a patient

1. Last name - you don't need to enter the entire last name.
2. Date of birth - type it in or click on the calendar icon to select a date.
3. Scan a QR code presented by the patient or scan a drivers license (not available in all states) - a QR code gets generated if the patient registers in advance. Scanning the driver's license is available in states that support this.



3. Let's add a new test patient to try out some workflows. To do this, click on the "Add a New Patient" button. Enter the information in the fields; you can enter all the information manually or scan a driver's license (look in the upper righthand corner). (This is available in states where it's supported).

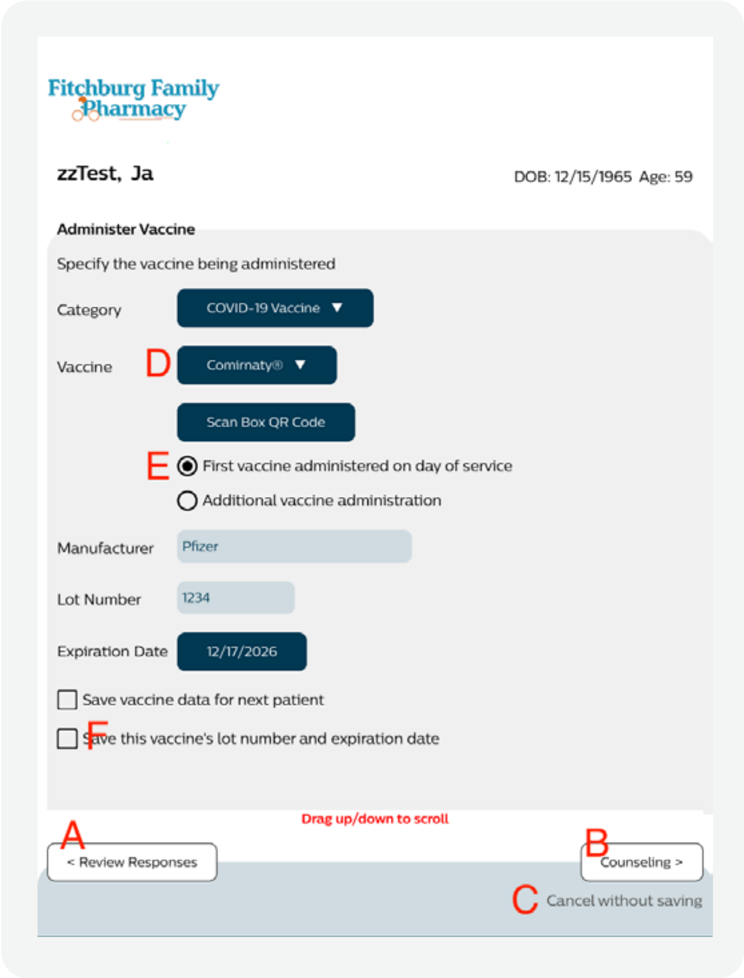


Give your patient a last name that starts with Zz (e.g. ZzTest). The Workflow Services system recognizes zzTest as a test patient and will not process any of the data you generate while working with them. Choose a birthday you will remember, so you can pull up this test patient to try out workflows in the future.

4. Once you have this patient added, take some time to look around the workflows. We recommend testing and becoming familiar with the workflows you will be working with in your pharmacy.

Most screens in a workflow has the following options:
A. Return to the previous screen.
B. Advance to the next screen.
C. Cancel without saving.

Additional actions that can be taken on various screens are indicated by:
D. Highlighted navy boxes.
E. Radio buttons.
F. Check boxes.



5. Continue through a workflow until you reach the final screen and there are no more options available. The final screen will say **Save and Exit.** Remember to use Training Mode or a patient with the last name Zztest when testing the workflows. Keep in mind there will be some things that can't be done with a test patient. Ie. charge a credit card, submit a claim, etc.

Things to note:

Self Registration

The workflow will vary slightly if a patient registers in advance for a service.
We recommend trying this out by doing a self registration for a test patient and then going through the workflow as if the test patient has checked into your pharmacy.

Insurance

Workflow Services workflows can be used to bill **medical insurance**. Therefore, when collecting or confirming insurance information for a patient, make sure you are adding their **medical insurance** information.

If your pharmacy is contracted with, or enrolled with a payer, that payer will be listed on the drop down menu for you or the patient to select. If not, please select other and still collect an image of the insurance card.

Billing/Credit Card

Medical billing claims can take a few weeks to adjudicate. The result of this adjudication could be some patient responsibility in the form of a copay, co-insurance, or a deductible. We recommend keeping a credit card on file for ALL patients to be able to collect any balance that is determined by the payer. If a credit card is on file, Workflow Services will automatically charge the customer for the balance on your behalf.

Medical Billing

Complete and accurate information is important if you will be using the workflows to submit claims for medical billing. Be sure to accurately document any counseling that was provided on the Counseling/ Evaluation and Management screen and review the Billing screen before submitting.

You did it!! You have completed the Intro to Workflows training module.
Add a checkmark to your Onboarding Checklist and go on to your next step.

Troubleshooting in the Workflows

Every now and then you may encounter a hiccup while using the app. If you do, try any of these to resolve the issue.

1. **Update the App.** Check in the app store to see if there is an update available.

2. **Restart the App**. Quitting the app and reopening can sometimes clear up small bugs.

3. **Check your Internet Connection.** Make sure your wifi is working. This sounds obvious, but we've missed this before ourselves!

4. **Log Out and Back In.** In the app, tap Account in the lower left corner to access your account settings. Here you'll find the button to log out, and then log back in.

5. **Refresh Your Workflows.** In the same account settings, hit the Refresh Workflows to make sure you have the latest updates of all the workflows in your account.