## Registration

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|---|---|
| 1. From your invitation email, click on the link to register. | **From:** automated <automated@synergistix.com><br>**Sent:** Friday, April 19, 2024 12:16 PM<br>**To:** qc <qc@synergistix.com><br>**Subject:** QC Room HCP Portal Invitation to Join<br><br>Dear Kurban, William, MD<br><br>You have been invited to join the Mercy Hosp business account for the purpose of ordering sample products. Please click the link below to complete the registration and enrollment process.<br><br>Click here to register<br><br>Note: You will not be eligible to order samples until this process is successfully completed.<br><br>If you have any questions, once registered, please visit our support page to access available support options.<br><br>Thank you |
| 2. Enter your **Email** and **Password** for the new account, then click **Submit**. |  |
| 3. An email containing a **Code** will be sent to the email address entered for the account. | **Synergistix**<br><br>**Email Validation**<br><br>Hello,<br>Thank you for joining our portal.<br>In order to activate your account, please enter the following code:<br><br>**879524**<br><br>*This code is valid for the next 30 minutes and can only be used once.*<br><br>If you didn't request this, you can safely ignore this email. If you have any questions or concerns, you can contact us at 1 (800)-240-5746 or catshelp@syncrm.com. |
| 4. Return to the portal screen and enter the verification code from the email, then click **Submit**. |  |

5. An HCP **Terms of Use Agreement** will display. Review the agreement and then click the **Agree** button.

   **Registration** is now complete.

   The final step is to **enroll** in a product storefront, so you can being to order sample products.

   

   Terms of Use

   **Healthcare Practitioner Order Portal Terms of Use Agreement**

   By accessing or using the Healthcare Practitioner Order Portal, you agree to comply with the following terms and conditions, and any policies, guidelines or amendments thereto that may be added from time to time (collectively, this ?Agreement?). We may update this Agreement in the future without notice other than posting the updated Agreement, and you will be able to find the most current version of this Agreement here.

   1. USE OF SERVICES

   By using this Healthcare Practitioner Order Portal, you represent that you are appropriately licensed and able to receive samples under the laws of the United States. In order to use the Portal services, you will be required to provide current, accurate identification, contact, and other information as part of the registration process and/or continued use of the Portal. You are responsible for maintaining the confidentiality of your account password, and are responsible for all activities that occur under your account. You agree to immediately notify SYNERGISTIX of any unauthorized use of your password or account or any other breach of security.

   2. HEALTHCARE PRACTITIONER ORDER PORTAL PRIVACY POLICY

   By using the Healthcare Practitioner Order Portal services, you acknowledge and agree that SYNERGISTIX may access, preserve, and disclose your account information and any associated order information to fulfill the orders and

   Document Version: 1.0                    CANCEL    AGREE

6. A pop-up message will display, to prompt you to complete the enrollment steps. Click **Continue**.

   ⓘ Enrollment

   You must complete enrollment in the QC Room storefront before you will be able to order products.

   CONTINUE

7. Use the NPI Search field to lookup **Professional Information** by your **NPI** number, then click **Finish**.

   Enrollment

   1  Add Business/Practice info

   **Add Professional Information**

   Enter your name or NPI in the HCP search field, and select the state. Click the magnifying glass icon to search.

   NPI Search                                        State
   1234567890                                        FL       🔍

   Need help?  (877)-731-8665  v4235@catshelp.com                    FINISH

8. Answer the **Eligibility Question**, then click **Next**.

9. **HCP** is automatically selected as your **Role**. Click **Next**.

   Enrollment is now complete.

   **Select your Role**
   Please select the role that best describes your position
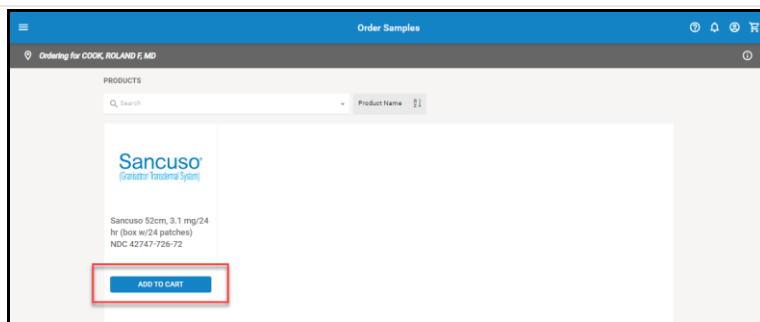
   Role*
   HCP

   syncrm.com                    NEXT

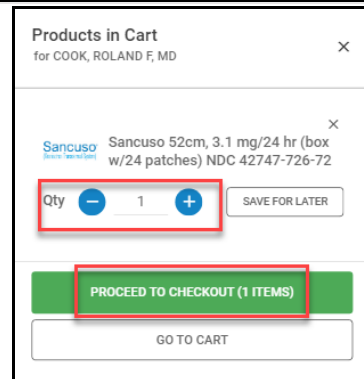## Create a Sample Product Order

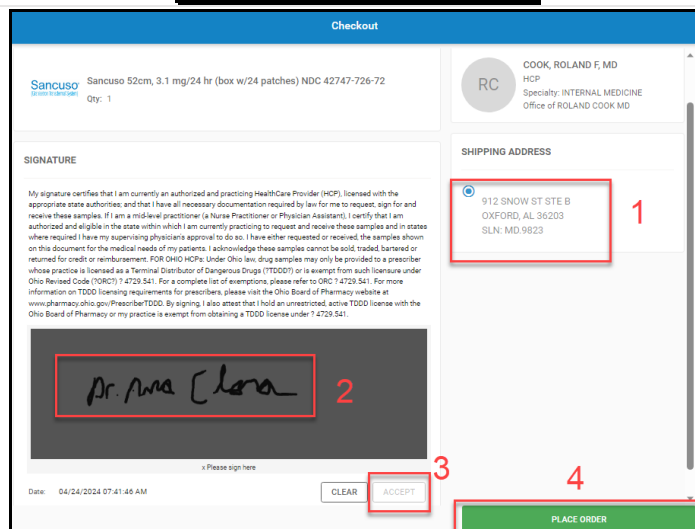| | |
|---|---|
| 1. Click on the **Add to Cart** button for the product. |  |
| 2. A pop-up window will display **Products in Cart**.<br><br>Before you proceed to checkout your order, you can adjust the quantity of the order from here, if needed.<br><br>3. Click **Proceed to Checkout**. |  |
| 4. From the **Checkout** screen:<br><br>• Select the **Shipping Address** to be used.<br><br>• Enter your signature.<br><br>• Click the **Accept** button for the signature.<br><br>• Click **Place Order**. |  |
| 5. An Order Confirmation screen will display. Click **Done**.<br><br>6. The **Sales Rep** will then receive a **Rep Review Email**, to confirm and complete the order. (In the **Order History** screen on the next page, you can that this is the **Status** of several pending orders: **Waiting Rep Review**.) |  |

CUMBERLAND PHARMACEUTICALS

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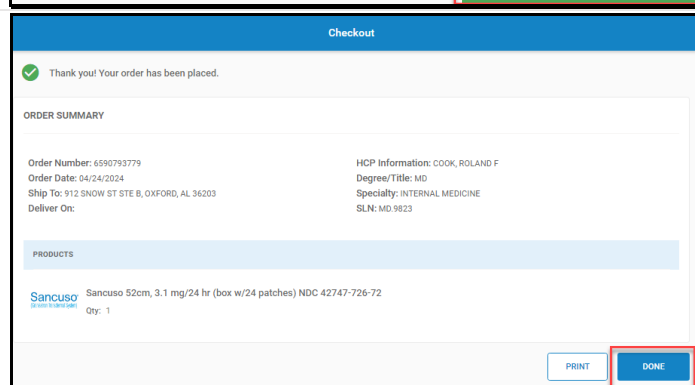
Click the menu button ☰ in the upper left corner of the portal screen to access the following additional tools.

**Order History**

The **Order History** screen displays all current product orders, including an **Order #** and the **Status** of the order, such as *Waiting Rep Review*, *Processing*, *Shipped*, etc.



If you have a long list of orders, you can use the two **filter options** on the upper right to display only those orders that match a specified **Status** or orders from a specified **time range**.

## AOC Clearance Tool

The Acknowledgement of Contents (AOC) clearance tool allows HCPs to clear outstanding AOCs from product orders.

| | |
|---|---|
| 1. Select **AOC Clearance Tool** from the menu.  |  |
| A new screen will display all current orders requiring an AOC. Note the **AOC Status** of the listed orders. Orders with an **AOC Status** of **Open** (green), need to have a signature entered.<br><br>2. To clear an open order which requires a signature, tap or click on an order with **AOC Status** = **Open**. |  |
| 3. On the next screen, select **Yes** or **No** to indicate receipt of the order items, then click **Save & Next**. |  |
| 4. If you select **No**, the **Edit Quantity** buttons will become active, for each item in the order. |  |
| 5. Click on **Edit Qty** to adjust the quantity, if needed.<br><br>An adjust quantity screen will display.<br><br>6. Adjust the quantity, then tap **Submit** |  |
| 7. Enter a new signature for the updated quantity, then click the **Accept** button for the signature.<br>8. Click **Save** to complete the AOC. | |
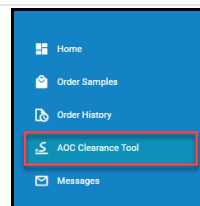
**Home Screen - Dashboard**



Select **Home** from the Navigation Menu.
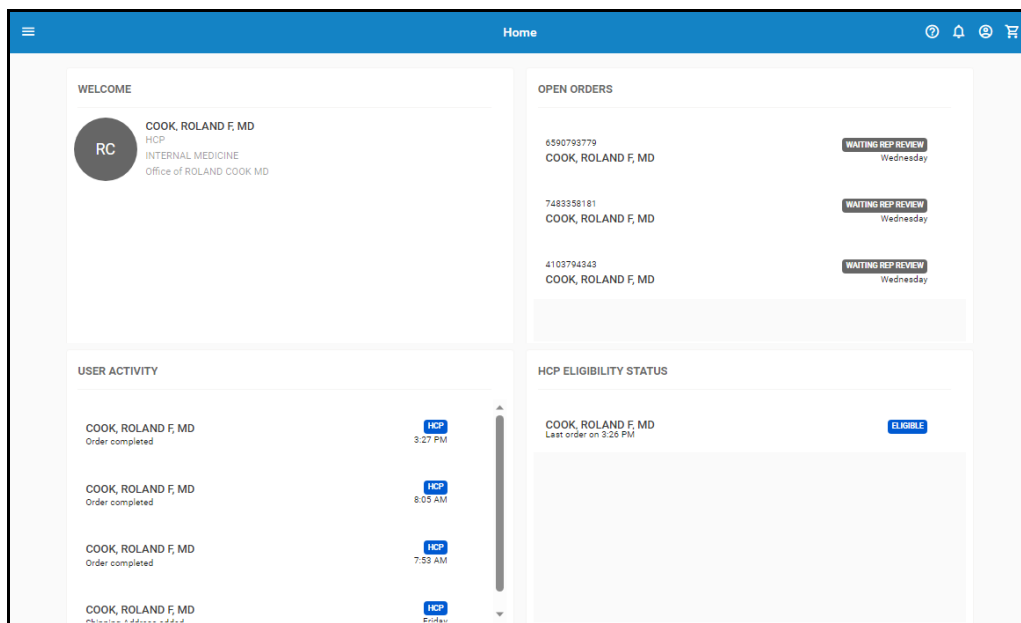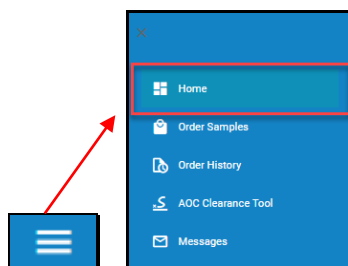


The Home Screen displays **four** sections of information for the HCP:

- **Welcome** – displays information for the HCP user that is logged in
- **Open Orders** – displays all open orders for the HCP and includes order status
- **User Activity** – displays a history of all actions by the HCP
- **HCP Eligibility Status** – displays the current HCP status for ordering sample products:

    o **Eligible** – eligible to order, no issues
    o **Ineligible** – not eligible to order due to a "hard stop issue"
    o **Warning** – eligible to access, but ordering will be limited (i.e. Overdue AOC)
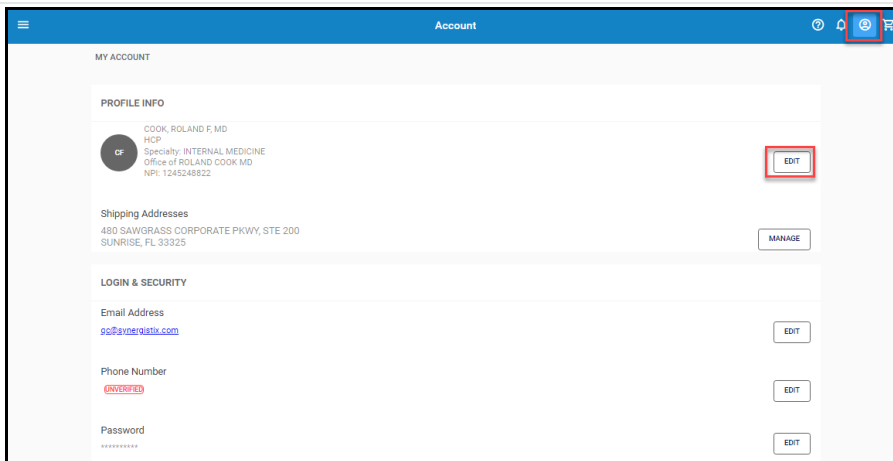
**My Account**

The **My Account** screen displays all of your account information, which can be edited or updated when needed.

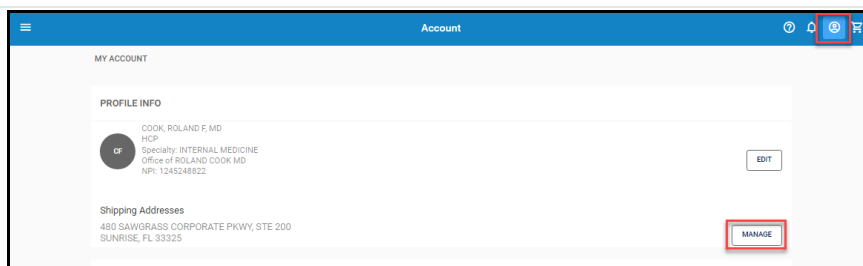1. Click the **My Account** button (upper right of screen).
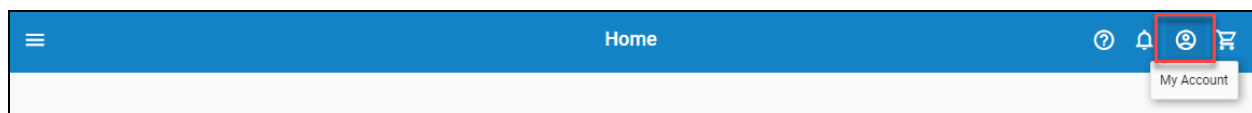
1. Click the **Edit** button next to **Professional Info** to update the HCP's info.

2. Update info as needed, then tap **Save**.



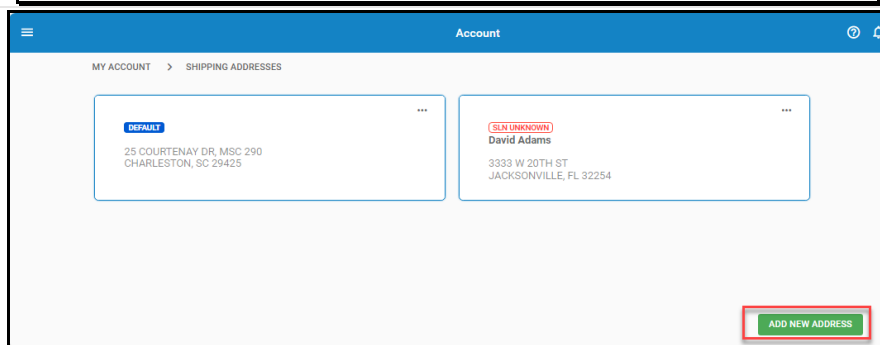**Shipping Addresses** can also be updated from **My Account**.

1. Tap the **Manage** button next to **Shipping Addresses**.



All Shipping Addresses for the account will display.

2. To add a new address for the account, click

   An **Add Shipping Address** screen will display.

3. Add the new address information, then click **Save**.



4. A new address must then be *validated*. Click the three dot icon [...] and select **Validate**.
5. To make a new address the **default shipping address**, click the three dot icon [...] and select **Set as Default**.
6. Select **Edit** to update an address.
7. To remove a shipping address from an account, click the three dot icon and select **Remove**.